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# CumulusCI Documentation

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## INTRODUCTION

CumulusCI helps development teams build great applications on the Salesforce platform by automating org setup, testing, and deployment.

### 1.1 Automation with CumulusCI

If your product development lifecycle and release process is anything like ours at Salesforce.org, it's complex. You're managing multiple packages, dependencies, orgs, and release versions. Not to mention managing org metadata and all the setup operations that need to run in the right sequence, before or after a package is installed, to create a properly configured org.

For example, Nonprofit Success Pack (NPSP) is one of Salesforce.org's flagship open source products. NPSP is a large, complex application with many different components. It consists of six managed packages (five dependencies plus itself) with multiple dependency relationships. Using automation, all five dependent packages are deployed in the right sequence; the unpackaged record types for the Account and Opportunity objects are delivered; and the final configurations to make the customers' experience better, such as setting up Global Actions and delivering translations, are performed. Biweekly NPSP releases are easy for new customers to install, with all the right configuration and without requiring end users to work through a lengthy setup guide.

The CumulusCI suite of tools is part of the not-so-secret sauce that makes it possible for Salesforce.org to build and release products at high volume, velocity, and quality. CumulusCI automation runs throughout the Salesforce development lifecycle, starting from feature branches through the delivery of the latest release.

- The CumulusCI command-line interface, `cci`, runs single-action tasks and multiple-action flows for development and testing.
- MetaCI uses CumulusCI flows to build Salesforce managed packages from GitHub repositories.
- MetaDeploy automates setup and configuration of customer orgs.

You can use the very same automation used internally by Salesforce.org to quickly:

- Build sophisticated orgs with dependencies automatically installed.
- Load and retrieve sample datasets to make your orgs feel like a production environment.
- Apply transformations to existing metadata to tailor orgs to your specific requirements.
- Run builds in continuous integration systems.
- Create end-to-end browser tests and set up automation using [Robot Framework](#).

The automation defined using CumulusCI is portable. It's stored in a version control repository and can be run from your local command line, from a continuous integration system, or from a customer-facing installer. CumulusCI can run automation on scratch orgs created using the Salesforce CLI, or on persistent orgs like sandboxes, production orgs, and Developer Edition orgs.

Finally, by way of introduction, CumulusCI is more than just a set of tools. It represents our holistic approach to product development. Rather than focusing on just the [Org Development Model](#) or the [Package Development Model](#), Salesforce.org has implemented its own *Product Delivery Model* using CumulusCI.

## 1.2 The Product Delivery Model

The Product Delivery Model focuses on the customer experience, not on the technical artifacts you're delivering. When building a product, there are detailed technical considerations for whether an individual component is best distributed within a package, or as additional unpackaged metadata, or as setup automation that runs before or after a package is installed. It's not uncommon for managed packages that don't use the Product Delivery Model to require customers to perform manual configuration steps that can take hours, or even days, to complete. The Product Delivery Model lets teams develop configurations directly into automated workflows, making it possible to deliver a first-class, fully configured product to the customer.

CumulusCI automation, which makes it easy to create products that span multiple package repositories and include complex setup operations, best implements the Product Delivery Model, along with MetaDeploy and other applications in the CumulusCI suite.

## 1.3 Anyone Can Use CumulusCI

Salesforce.org uses CumulusCI to develop products for our nonprofit and education constituents — both public, open source products such as NPSP and commercial managed package products developed in private GitHub repositories. But anyone developing on the Salesforce platform can use CumulusCI. It supports both open source and private development, and building managed package products or org implementations.

Automation defined using CumulusCI can support all roles on a project.

- *Developers* can create new development environments for different feature branches.
- *Quality engineers* can create test environments from feature branches and managed package installs.
- *Documentation teams* can create environments to interact with new features and retrieve screenshots.
- *Product managers* can create environments to interact with new features and provide feedback on future work.
- *Release engineers* can create beta and final releases and push them to subscriber orgs.
- *Partners* can create their own projects on top of your package.
- *Customers* can install the product and get set up using the same automation steps used during development and QA.

## 1.4 Where Does CumulusCI Fit in the Toolchain?

Developers often ask whether CumulusCI competes with or replaces Salesforce DX, the Salesforce command line interface (CLI) for development, testing, and continuous integration. It doesn't. Like Salesforce DX, CumulusCI is designed to maintain the source of truth for a project in a version-controlled repository, and to make it as easy as possible to set up an org from scratch. CumulusCI uses the Salesforce CLI to perform operations such as creating scratch orgs, and is an alternative to bash scripts for running sequences of Salesforce CLI commands.

CumulusCI builds on top of the commands provided by the Salesforce CLI, and helps to manage and orchestrate them into a simple, straightforward user experience. CumulusCI implements a complete development, test, and release process that comes with a standard library of functionality, while the Salesforce CLI is a lower-level toolbelt that drives particular workflows within the overall process.



For non-developers, knowing Salesforce DX isn't a requirement for using CumulusCI. Neither is knowing Python, the language CumulusCI is written in (in the same way that most Salesforce DX users don't need to know Node.js). If you're going to get fancy with CumulusCI customizations, only then does Python come in handy.

## 1.5 Why Is It Called CumulusCI?

Before there was the toolset known today as CumulusCI, there was a product that would go on to become Nonprofit Success Pack (NPSP). This product had the code name Cumulus. Early on, continuous integration (CI) tools were created for the Cumulus product. This tooling expanded in scope and scale to eventually become CumulusCI. Even though it's used for much more than CI, and for many more products than NPSP, the name has stuck.

## 1.6 Learn More Through Demos

Love demos? These no-audio screencasts show how to use CumulusCI from a command line.

Initialize a fresh CumulusCI project.

Retrieve metadata from a Salesforce org and save it in GitHub.

Manage sample or test data.

Customize flows and use CumulusCI for QA.

For a narrated demo, see Jason Lantz's [PyCon 2020 presentation](#) (00:36 through 00:54).



## KEY CONCEPTS

Let's review some important concepts when building and testing features using CumulusCI.

### 2.1 Packages

CumulusCI works well with both managed package projects and org implementations. However, packages always play a role in how projects are built and deployed.

A *package* is a container for something as small as an individual component or as large as a sophisticated application. After creating a package, you can distribute it to other Salesforce users and organizations, including those outside your company.

*Unmanaged packages* are typically used to distribute open-source (non-proprietary) features or application templates to provide developers with the basic building blocks for an application. After the components are installed from an unmanaged package in a specific org, it's what's known as an *org implementation*. These freshly installed components can be edited by the owners of the implementation. The developer who created and uploaded the unmanaged package has no control over the installed components, and can't change or upgrade them.

*Managed packages* are typically used by Salesforce partners to distribute and sell applications to customers. They are proprietary code that can be upgraded and deployed only by the developer that built them. To ensure seamless upgrades, managed packages don't allow certain destructive changes, such as deleting objects or fields.

In CumulusCI, packages are built and deployed via projects.

### 2.2 Projects

When you work with CumulusCI, you do so inside a *project*. A project is an individual Git repository that contains both Salesforce metadata and CumulusCI automation (such as tasks and flows) that builds and releases the project. If you are building multiple packages, we strongly recommend organizing each package as a separate project in its own repository.

---

**Important:** CumulusCI's standard library assumes that there is one package per repository, so it will work best if you follow this convention.

---

It's important to note that a project doesn't have to contain a package. For example, a project can deliver unpackaged metadata, deliver automation but no metadata at all, or provide test data for QA. A project can contain the entirety of a product offered to customers, or be just one of multiple projects that combine to form a complete product.

To sum up, although a project doesn't require a package, a package requires a project to be built and deployed.

## 2.3 Tasks and Flows

CumulusCI uses a framework of *tasks* and *flows* to organize the automation that is available to each project.

Tasks are units of automation. A task can perform a deployment, load a dataset, retrieve data from an org, install a managed package, or do many other things. CumulusCI ships with scores of tasks in its standard library. You can run `cci task list` to view them all.

Popular task commands include:

- `cci task list`: Review the tasks available in a project.
- `cci task info <name>`: Learn more about a task `<name>` and how to configure its options.
- `cci task run <name> --org <org>`: Run the task `<name>` against the org `<org>`.

For example, the `run_tests` task executes Apex unit tests. If you have an org called `dev`, you can run this task against it with the command `cci task run run_tests --org dev`.

Many operations in CumulusCI, including creating new orgs, use flows. Flows are ordered sequences of tasks (and even other flows!) that produce a cohesive outcome, such as an org that's configured to suit a workflow like development, QA, or product demonstration.

Popular flow commands include:

- `cci flow list`: Review the flows available in a project.
- `cci flow info <name>`: Learn more about the flow `<name>` and the tasks it contains.
- `cci flow run <name> --org <org>`: Run the flow `<name>` against the org `<org>`.

For example, the `dev_org` flow sets up an org for development purposes. If you have an org called `dev`, you can run this flow against it with the command `cci flow run dev_org --org dev`.

Many of the most common flows you'll work with in CumulusCI are designed to build and configure specific orgs for you. Here's a few of the most common flows that build orgs.

- `dev_org`: This flow builds an unmanaged org designed for development use. It's typically used with an org whose configuration is `dev` or `dev_namespaced`.
- `qa_org`: This flow builds an unmanaged org designed for testing. It's typically used with an org whose configuration is `qa`.
- `install_beta`: This flow builds a managed org with the latest beta release installed, for projects that build managed packages. It's typically used with an org whose configuration is `beta`.
- `install_prod`: This flow builds a managed org with the latest release installed, for projects that build managed packages.
- `regression_org`: This flow builds a managed org that starts with the latest release installed and is then upgraded to the latest beta to simulate a subscriber upgrade for projects that build managed packages. It's typically used with an org whose configuration is `release`.

CumulusCI derives the library of tasks and flows available for any project by combining its internal standard library with your customizations in `cumulusci.yml`. Customizations can add new tasks and flows, customize the way tasks behave, and extend, combine, and modify flows to better suit the project's needs. We cover customization in depth in the [Configure CumulusCI](#) section.

## 2.4 Project Structure

### 2.4.1 Project Directory

The project directory is the root of your CumulusCI project. Because each project is linked to a single GitHub repository, CumulusCI knows which project you are working on by the current working directory of your shell.

---

**Tip:** Avoid headaches by making sure you're in the correct repository for your project before running project-specific commands. Otherwise, your project produces an error. (**Check your repo first** when troubleshooting in CumulusCI and potentially save yourself an extra trip to this guide.)

---

In order to be used as a CumulusCI project, a directory must both be a Git repository and contain a `cumulusci.yml` configuration file. We cover how to get set up with a new or existing CumulusCI project in the [Get Started](#) section.

### 2.4.2 `cumulusci.yml`

The `cumulusci.yml` file defines a project's automation. It contains all the customizations and configurations that pertain to your project's lifecycle. It can encompass everything from customizing the shapes of scratch orgs to configuring tasks and flows.

Learn more about customizing CumulusCI automation in the [Configure CumulusCI](#) section.

### 2.4.3 `force-app` (or `src`)

The main body of the project's code and metadata lives in the default package directory, which is the `force-app` directory for Salesforce DX-format projects and the `src` directory for Metadata API-format projects. `force-app` defines what's included when you release a managed package from your CumulusCI project. (Or when you release an unlocked package, or if you're not releasing a package at all but running the `deploy` task to get the metadata into an org in unmanaged form.)

### 2.4.4 `orgs` directory

The `.json` files found in the `orgs` directory define the Salesforce DX org configurations that are available to the project. See [Manage Scratch Orgs](#) for more information.

### 2.4.5 `datasets`

Each project can have one or more datasets: on-disk representations of record data that can be inserted into Salesforce orgs, and that can also be modified and re-captured during the evolution of the project. Datasets are stored in the `datasets` directory. Learn more about datasets in [Automate Data Operations](#).

## 2.4.6 robot

Robot Framework provides browser automation for end-to-end testing. Each project contains a `robot` directory, which stores the project's Robot Framework test suites. New projects start with a simple Robot test case that creates a Contact record.

While Robot Framework is used primarily for automated browser testing, it can also be harnessed to help configure orgs where other strategies and APIs are insufficient.

See [Automation using Robot Framework](#) for more information.

## 2.4.7 unpackaged metadata

As we touched upon earlier, a project doesn't just encompass the contents of a managed package or a single deployment. It also includes *unpackaged metadata*: extra bundles of Salesforce metadata that further tailor an org or complete the product.

In a CumulusCI project, all unpackaged metadata is stored in subdirectories within the `unpackaged` directory. Unpackaged metadata plays multiple roles, including preparing an org for installing packages, adding more customization after the package or application is deployed, and customizing specific orgs that are used in the product's development process.

Learn more in the [Manage Unpackaged Configuration](#) section.

# 2.5 Project Orgs & Services

Orgs and services are external, authenticated resources that each project uses. CumulusCI makes it easy to connect orgs and services to a single project, or to use them across many projects.

## 2.5.1 Orgs

Each project has its own set of orgs, including active scratch orgs, persistent orgs like a production or packaging org, and predefined scratch org configurations. CumulusCI securely stores org authentication information in its keychain, making it easy to access connected orgs at any time. The `cci org list` command shows all of the orgs connected to a project. Orgs can also be shared across multiple projects.

Configuring orgs in CumulusCI is powerful, but comes with some complexity. For details, see [Manage Scratch Orgs](#) and [Connect Persistent Orgs](#).

## 2.5.2 Services

Services represent external resources used by CumulusCI automation, such as access to a GitHub account or a MetaDeploy instance. Services are usually, but not always, connected to CumulusCI across projects as part of the global keychain. The command `cci service list` shows you which services are connected in the context of the current project.

Global services are easy to use and share. We recommend that you use them as much as possible. However, services can also be connected at the project level, which means that they're scoped to a single project and cannot be shared.

For more information on configuring services via the `cci` command line see the [managing services](#) section.

## GET STARTED

### 3.1 Install CumulusCI

---

**Tip:** These installation instructions assume some familiarity with entering commands into a terminal. If that's completely new to you, we recommend visiting the [CumulusCI Setup](#) module on Trailhead for a step-by-step walkthrough.

---

#### 3.1.1 On macOS

[Homebrew](#) is a prerequisite for installing CumulusCI on macOS. Follow the instructions on the Homebrew website to install Homebrew before continuing.

##### Install via pipx

`pipx` ensures that CumulusCI and its dependencies are installed into their own Python environment separate from other Python software on your computer. **We cannot recommend it enough!**

First, install `pipx` with these commands:

```
$ brew install pipx
$ pipx ensurepath
```

After `pipx` installs, install CumulusCI:

```
$ pipx install cumulusci
```

When finished, *verify your installation*.

#### 3.1.2 On Linux

##### Install via pipx

`pipx` ensures that CumulusCI and its dependencies are installed into their own Python environment separate from other Python software on your computer. **We cannot recommend it enough!**

Installation instructions for `pipx` can be found [here](#).

After `pipx` installs, install CumulusCI:

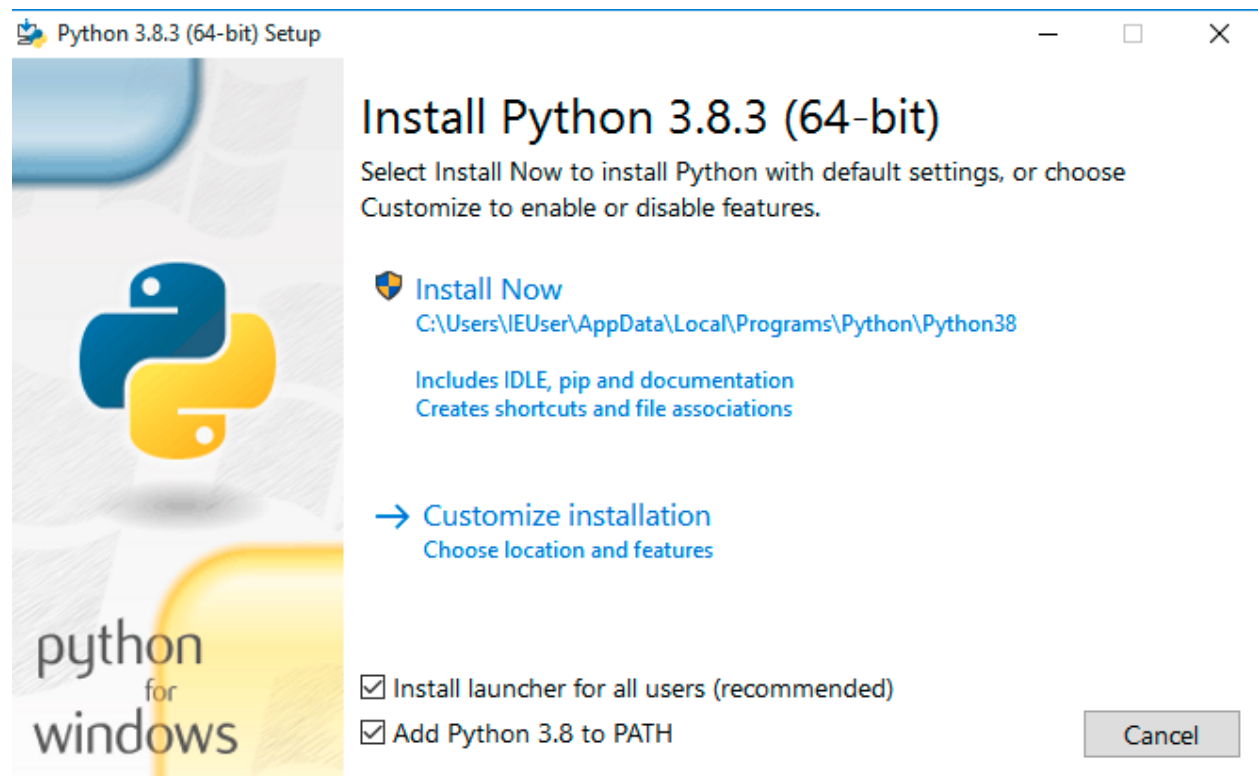
```
$ pipx install cumulusci
```

When finished, *verify your installation*.

### 3.1.3 On Windows

#### Install Python 3

1. Go to the [Python downloads](#) page.
2. Download the latest Python 3 release. Most users select the “Download Windows x86-64 executable installer” link for the most recent stable release, but it depends on your particular computer setup.
3. Install using the installation wizard.
  - Select **Add Python <version> to PATH**.
  - Click “Install Now”.



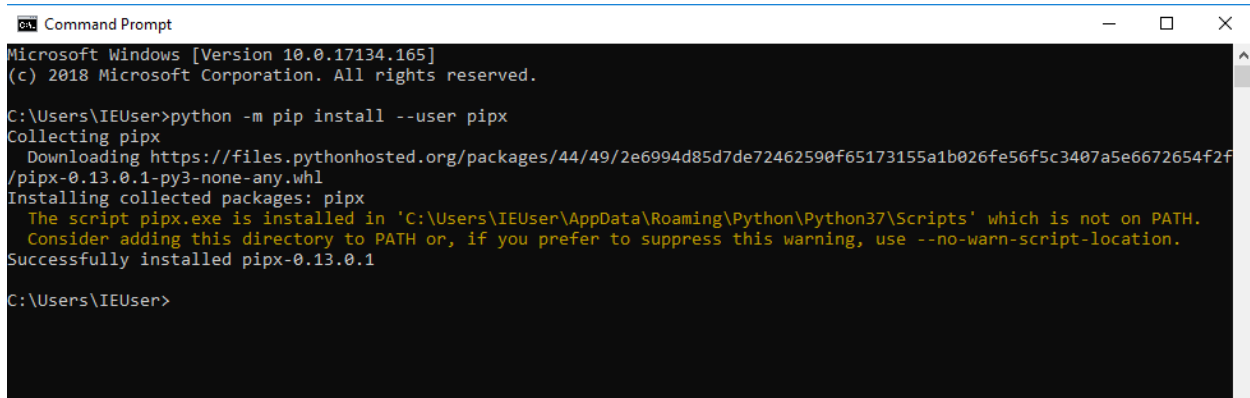
#### Install via pipx

pipx ensures that CumulusCI and its dependencies are installed into their own Python environment separate from other Python software on your computer. **We cannot recommend it enough!**

Open your preferred terminal application (such as `cmd.exe` on Windows). If your terminal is already open, close it and reopen it. Enter this command:

```
$ python -m pip install --user pipx
```





```

Microsoft Windows [Version 10.0.17134.165]
(c) 2018 Microsoft Corporation. All rights reserved.

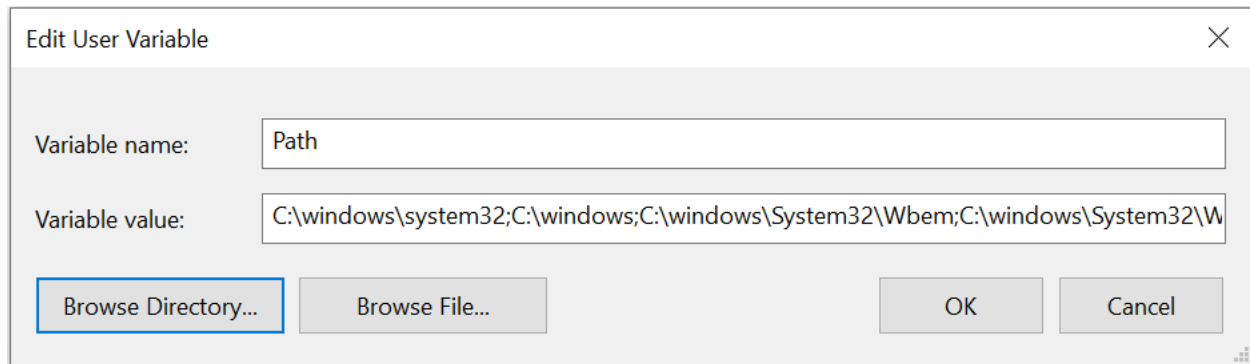
C:\Users\IEUser>python -m pip install --user pipx
Collecting pipx
  Downloading https://files.pythonhosted.org/packages/44/49/2e6994d85d7de72462590f65173155a1b026fe56f5c3407a5e6672654f2f/pipx-0.13.0.1-py3-none-any.whl
Installing collected packages: pipx
  The script pipx.exe is installed in 'C:\Users\IEUser\AppData\Roaming\Python\Python37\Scripts' which is not on PATH.
  Consider adding this directory to PATH or, if you prefer to suppress this warning, use --no-warn-script-location.
Successfully installed pipx-0.13.0.1

C:\Users\IEUser>

```

To permanently modify the default environment variables:

1. Click Start and search for edit environment variables, or open System properties and click Advanced system settings.
2. Click the Environment Variables button.
3. To change System variables, you need non-restricted access (administrator rights) to your machine. Add these paths to your PATH environment variable:
  - %USERPROFILE%\local\bin
  - %USERPROFILE%\AppData\Roaming\Python\Python38\Scripts



**Note:** Be precise when entering these paths. Add them at the very end of the Variable Value already in place. Separate each path by a semicolon (;) with no space between path names.

Open a new command prompt and verify that pipx is available:

```
pipx --version
```

Look for a version number after entering this command, such as: 0.12.3.1.

If you get an error instead, such as 'pipx' is not recognized as an internal or external command, operable program or batch file., confirm that your environment variables have been updated.

Finally, install CumulusCI with this command:

```
pipx install cumulusci
```

When finished, *verify your installation*.

### 3.1.4 Verify Your Installation

In a new terminal window, verify that CumulusCI installed correctly by running `cci version`.

```
$ cci version
CumulusCI version: 3.29.0 (/path/to/bin/cci)
Python version: 3.8.5 (/path/to/bin/python)

You have the latest version of CumulusCI.
```

You can also use this command to check whether your CumulusCI installation is up to date.

Still need help? Feel free to submit a question on our [Trailblazer community group](#).

## 3.2 Set Up SFDX

Scratch orgs created by Salesforce DX allow teams to work efficiently in individual, fully-configured environments that are easy to create and destroy. We recommend working with scratch orgs throughout the development process.

To set up Salesforce DX:

1. [Install Salesforce CLI](#)
2. [Enable Dev Hub Features in Your Org](#)
3. [Connect SFDX to Your Dev Hub Org](#) - Be sure to use the `--setDefaultdevhubusername` option!

If you have the `sfdx` command installed, are connected to your Dev Hub, and set the `defaultdevhubusername` config setting (use `sfdx force:config:list` to verify), you're now ready to use `cci` with `sfdx` to build scratch orgs.

---

**Important:** SFDX supports multiple Dev Hubs, so CumulusCI uses the one set as `defaultdevhubusername` when creating scratch orgs.

---

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**Tip:** For a detailed introduction on how to set up Salesforce CLI and Visual Studio Code to work with CumulusCI, review the [Build Applications with CumulusCI](#) module on Trailhead.

---

Learn more about Salesforce DX at <https://developer.salesforce.com/platform/dx>.

## 3.3 Connect to GitHub

In order to allow CumulusCI to work with your repositories in GitHub, connect GitHub as a service in `cci`.

First, [create a new personal access token](#) with both **repo** and **gist** scopes specified. (Scopes appear as checkboxes when creating the personal access token in GitHub.) Copy the access token to use as the password when configuring the GitHub service.

Next, run the following command and provide your GitHub username and access token as the password:

```
$ cci service connect github mygithub
```

Verify the GitHub service is connected by running `cci service list`:

```
[~/repos/cumulusci]~[feature/doc-reorg__get_started]
$ cci service list
```

Name	Description	Configured
connected_app	A Connected App is required to connect to and run commands against persistent orgs. See <a href="http://cumulusci.readthedocs.io/en/latest/tutorial.html#creating-a-connected-app">http://cumulusci.readthedocs.io/en/latest/tutorial.html#creating-a-connected-app</a> for more info.	
devhub	Configure which SFDX org to use as a Dev Hub for creating scratch orgs	✓
github	Configure connection for github tasks, e.g. Create Release	✓
metaci	Connect with a MetaCI site to run builds of projects from this repository	
metadeploy	Connect with a MetaDeploy site to publish installers from this repository	✓
apextestsdb	Configure connection for ApexTestsDB tasks, e.g. ApextestsdbUpload	
saucelabs	Configure connection for saucelabs tasks.	

After you've configured the `github` service, it's available to *all* CumulusCI projects.

Services are stored in the global CumulusCI keychain by default.

## 3.4 Work On an Existing CumulusCI Project

If you'd like to work on an existing CumulusCI project on GitHub, these are the prerequisites.

1. *Install CumulusCI*
2. *Install Git*
3. *Clone the Project's GitHub Repository*

**Note:** CumulusCI does not support projects stored on other Git hosts such as BitBucket or GitLab at this time.

You can change directories into the project's root directory and begin executing `cci` commands.

For example, `cci project info` shows information about the project:

```
$ cd cumulusci-test

$ cci project info
name: CumulusCI Test
package:
  name: CumulusCI Test
  name_managed: None
  namespace: ccitest
  install_class: None
  uninstall_class: None
  api_version: 33.0
git:
  default_branch: main
  prefix_feature: feature/
  prefix_beta: beta/
  prefix_release: release/
  release_notes:
    parsers:
      1:
```

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```
        class_path: cumulusci.tasks.release_notes.parser.GithubLinesParser
        title: Critical Changes
2:
        class_path: cumulusci.tasks.release_notes.parser.GithubLinesParser
        title: Changes
3:
        class_path: cumulusci.tasks.release_notes.parser.GithubIssuesParser
        title: Issues Closed
4:
        class_path: cumulusci.tasks.release_notes.parser.GithubLinesParser
        title: New Metadata
5:
        class_path: cumulusci.tasks.release_notes.parser.GithubLinesParser
        title: Deleted Metadata
repo_url: https://github.com/SFD0-Tooling/CumulusCI-Test
test:
    name_match: %_TEST%
```

## 3.5 Start a New CumulusCI Project

If you'd like to start a new CumulusCI project, these are the prerequisites.

1. *Install CumulusCI*
2. *Install Git*
3. *Install the Salesforce CLI*

Run the following commands to create a directory with your project's name, navigate to said directory, and initialize it as a Git repository:

```
$ mkdir cci_project
$ cd cci_project
$ git init
```

Then, initialize the project as a CumulusCI project.

### 3.5.1 Project Initialization

Use the `cci project init` command within a Git repository to generate the initial version of a project's `cumulusci.yml` file. CumulusCI creates a customized `cumulusci.yml` file by first asking questions about your project.

Prompt	What's it for?
Project Info	The name is usually the same as your repository name. NOTE: Do <b>not</b> use spaces in the project name.
Package Name	CumulusCI uses an unmanaged package as a container for your project's metadata. Enter the name of the package you want to use.
Is this a managed package project?	Yes, if this project is a managed package.
Salesforce API Version	Which Salesforce API version does your project use? Defaults to the latest API version.
Which source format do you want to use? [sfdx   mdapi]	DX source format (aka "SFDX Format") stores data under the <code>force-app</code> directory. Metadata API format is the "older" format and stores data under the <code>src</code> directory.
Are you extending another CumulusCI project such as NPSP or EDA?	CumulusCI makes it easy to build extensions of other projects configured for CumulusCI like Salesforce.org's NPSP and EDA. If you are building an extension of another project using CumulusCI and have access to its GitHub repository, use this section to configure this project as an extension.
Default Branch	Your project's main/master branch in GitHub. Defaults to the branch that is currently checked out in your local repository.
Feature Branch Prefix	Your project's feature branch prefix (if any). Defaults to <code>feature/</code> .
Beta Tag Prefix	Your project's beta branch prefix (if any). Defaults to <code>beta/</code> .
Release Tag Prefix	Your project's release branch prefix (if any). Defaults to <code>release/</code> .
Test Name Match	The CumulusCI Apex test runner uses a SOQL WHERE clause to select which tests to run. Enter the SOQL pattern to match test class names. Defaults to match classes ending in TEST.
Do you want to check Apex code coverage when tests are run?	If yes, checks Apex code coverage when tests are run.
Minimum code coverage percentage	Sets the minimum allowed code coverage percentage for your project.

### 3.5.2 Verify Project Initialization

Verify successful project initialization by verifying that `cumulusci.yml` exists and has contents.

```
$ cat cumulusci.yml
project:
  name: SampleProjectName
  package:
    name: SamplePackageName
    namespace: sampleNamespace
  .
  .
  .
```

The `cumulusci.yml` file configures your project-specific tasks, flows, and customizations.

Once you're satisfied, add and commit it to your Git repository.

```
$ git add cumulusci.yml
$ git commit -m "Initialized CumulusCI Configuration"
```

### 3.5.3 Add Your Repo to GitHub

With your `cumulusci.yml` file committed, create a repository on GitHub for your new project and push your changes there, using whichever method you prefer.

- Our [Community Project Development with CumulusCI](#) module covers GitHub Desktop in the “Set Up the Project” section.
- If you prefer the command line, GitHub has excellent guides on both [git remote](#) and [git push](#).

## 3.6 Convert an Existing Salesforce Project

Converting an existing Salesforce project to use CumulusCI can follow a number of different paths, depending on whether you’re practicing the Org Development Model or the Package Development Model; whether or not you’re already developing in scratch orgs; and the complexity of your project’s dependencies on the org environment.

If you’re developing in persistent orgs and not already using source control, you’ll also need to retrieve the existing metadata from the org. Note that the processes of adopting source control and moving from persistent orgs to scratch orgs tend to look different for everyone, and these transitions sometimes require additional work.

You’re welcome to discuss project conversion in the [CumulusCI \(CCI\) Trailblazer group](#).

### 3.6.1 Project Setup

Before retrieving your project’s metadata, set up the project’s root directory.

- Create a project directory and initialize it as a Git repository as outlined in [start a new CumulusCI project](#).
- Initialize the directory as a CumulusCI project as outlined in [project initialization](#).

### 3.6.2 Retrieve Metadata from the Persistent Org

This documentation assumes that your project currently lives in a persistent org, such as a Developer Edition org or a Sandbox. We recommend retrieving metadata via the Metadata API (using the Salesforce CLI), followed by converting the source from Metadata API to SFDX format.

1. If the metadata you want to retrieve isn’t already in a package, create one. See [creating packages](#) for more info.

---

**Note:** If your project contains a managed package, ensure that the package namespace matches the namespace you entered when running `cci project init`.

---

2. Run the `retrieve` command to extract your package metadata.

```
$ sfdx force:source:retrieve -n package_name /path/to/project/
```

That’s it! You now have all of the metadata you care about in a single Git repository configured for use with CumulusCI. At this point [add your repo to GitHub](#), or perhaps begin to [Configure CumulusCI](#).

### 3.6.3 Setup Scratch Orgs

To see how to use scratch orgs with CumulusCI see the *Manage Scratch Orgs* section.

### 3.6.4 Other Conversion Considerations

- If you or your team have been working with [scratch org definition files](#) for use with `sfdx`, see *Manage Scratch Orgs* for details on using them with CumulusCI.
- If you have metadata that you would like deployed pre- or post-deployment, see *Roles of Unpackaged Metadata*.
- If you have data that you need to include for testing or production purposes, see *Automate Data Operations*.





## THE CCI COMMAND LINE

### 4.1 Basic Operation

---

**Tip:** If you're new to working with command line interfaces, the [Install Visual Studio Code](#) Trailhead module covers installing and opening a terminal window in Visual Studio Code.

---

After *installing CumulusCI*, use the `cci` command in your terminal or command prompt to interact with it.

On any platform, you can use the integrated terminal in Visual Studio Code. Alternately, on macOS, access the terminal via `Terminal.app`; on Windows, open `cmd.exe`; or on Linux, use your preferred terminal application.

To see all available commands, type `cci` in your terminal.

```
$ cci
Usage: cci [OPTIONS] COMMAND [ARGS]...

Options:
--help  Show this message and exit.

Commands:
error    Get or share information about an error
flow     Commands for finding and running flows for a project
org      Commands for connecting and interacting with Salesforce orgs
project  Commands for interacting with project repository configurations
service  Commands for connecting services to the keychain
shell    Drop into a Python shell
task     Commands for finding and running tasks for a project
version  Print the current version of CumulusCI
```

To retrieve information on a specific command, type `cci <command>`.

Let's examine the `cci task` command:

```
$ cci task
Usage: cci task [OPTIONS] COMMAND [ARGS]...

Commands for finding and running tasks for a project

Options:
--help  Show this message and exit.
```

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```
Commands:
doc    Exports RST format documentation for all tasks
info   Displays information for a task
list   List available tasks for the current context
run    Runs a task
```

We can see that the `cci task` command has many useful subcommands, such as `cci task info`.

## 4.2 List Tasks and Flows

CumulusCI ships with many standard tasks and flows. The following commands list all available tasks and flows for a project:

```
$ cci task list
$ cci flow list
```

The tasks and flows listed are specific to the project directory that you're in when you run the command. For example, if you have a custom flow defined in your `cumulusci.yml` file for Project A, it will only be listed if you run `cci flow list` in Project A's root directory.

Tasks and flows are listed by their `group` attribute as specified in the `cumulusci.yml` file. It's easy to edit these groups as you see fit! Any modifications will be reflected in the `list` commands.

## 4.3 Task Info and Options

For additional information on task `<name>`, run either command:

```
$ cci task info <name>
$ cci task run <name> --help
```

Information about specific tasks includes:

- A description of the task.
- The Python class associated with this task.
- The syntax for running the command.
- Any options accepted or required by the task.

Each option available for a given task also lists:

- The syntax for the option (`--<name> value`).
- Whether the option is required or optional.
- A description of the option.

Let's examine the `util_sleep` task:

```
$ cci task info util_sleep
util_sleep
```

Description: Sleeps for N seconds

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```
Class: cumulusci.tasks.util.Sleep
```

#### Command Syntax

```
$ cci task run util_sleep
```

#### Options

```
--seconds SECONDS
Required
The number of seconds to sleep
Default: 5
```

## 4.4 Flow Info and Options

For additional information on flow <name>, run either command:

```
$ cci flow info <name>
$ cci flow run --help
```

Information about specific flows includes:

- A description of the flow.
- The ordered steps (and substeps) of a flow.

For example, listing the info for the `dev_org` flow shows that it's composed of three subflows: `dependencies`, `deploy_unmanaged`, and `config_dev`, and one task: `snapshot_changes`. The tasks and flows making up the three subflows are also listed.

```
$ cci flow info dev_org
Description: Set up an org as a development environment for unmanaged metadata
1) flow: dependencies [from current folder]
    1) task: update_dependencies
    2) task: deploy_pre
2) flow: deploy_unmanaged
    0) task: dx_convert_from
    when: project_config.project__source_format == "sfdx" and not org_config.scratch
    1) task: unschedule_apex
    2) task: update_package_xml
    when: project_config.project__source_format != "sfdx" or not org_config.scratch
    3) task: deploy
    when: project_config.project__source_format != "sfdx" or not org_config.scratch
    3.1) task: dx_push
    when: project_config.project__source_format == "sfdx" and org_config.scratch
    4) task: uninstall_packaged_incremental
    when: project_config.project__source_format != "sfdx" or not org_config.scratch
3) flow: config_dev
    1) task: deploy_post
    2) task: update_admin_profile
4) task: snapshot_changes
```

## 4.5 Run Tasks and Flows

Execute a specific task or flow with the `run` command.

```
$ cci task run <name> --org <org> [options]
$ cci flow run <name> --org <org> [options]
```

This command runs the task or flow `<name>` against the org `<org>`.

---

**Tip:** You can see a list of available orgs by running `cci org list`.

---

For example, the `run_tests` task executes Apex unit tests in a given org. Assuming there exists an org named `dev`, you can run this task against it with the command `cci task run run_tests --org dev`.

### 4.5.1 Get Help Running Tasks

If you're not certain about what a specific command does, use the `--help` flag to get more information.

```
$ cci task info <name> --help
```

When the `--help` flag is specified for a command, the output includes:

- A usage statement featuring the syntax that executes the command.
- A description of the command.
- The list of available options for use with the command.

```
$ cci task --help
Usage: cci task [OPTIONS] COMMAND [ARGS]...

Options:
--help  Show this message and exit.

Commands:
doc      Exports RST format documentation for all tasks
info     Displays information for a task
list     List available tasks for the current context
run      Runs a task
```

If you're just getting started with CumulusCI and aren't sure which of the many tasks and flows to use, don't worry. We show you specific tasks and flows in later sections of the documentation.

### 4.5.2 Specify Task Options When Running Flows

When executing a flow with `cci flow run`, you can specify options on specific tasks in the flow with the following syntax:

```
$ cci flow run <flow_name> -o <task_name>__<option_name> <value>
```

`<flow_name>` is the name of the flow to execute, `<task_name>` is the name of the task you wish to specify an option for, `<option_name>` is the option on the task you want to specify, and `<value>` is the actual value you want to assign to the task option.

For example, in the above output from `cci flow info dev_org` if we wanted to set the `allow_newer` option on the `update_dependencies` to `True`, we would use the following:

```
$ cci flow run dev_org --org dev -o update_dependencies__allow_newer True
```

**Note:** If the specified task executes more than once in the flow, it uses the given option value *each time it executes*.

If you want to configure specific task options on flows without explicitly listing them see [Configure Options on Tasks in Flows](#).

## 4.6 Access and Manage Orgs

CumulusCI makes it easy to create, connect, and manage orgs. The `cci org` top-level command helps you work with orgs.

To learn about working with orgs in detail, read [Manage Scratch Orgs](#) and [Connect Persistent Orgs](#).

## 4.7 Manage Services

Services represent external resources used by CumulusCI automation, such as access to a GitHub account or a MetaDeploy instance.

### 4.7.1 List Services

You can have CumulusCI show you a list of all possible services supported. Services that are not currently configured will be displayed in a dimmed row.

```
$ cci service list
```

### 4.7.2 Connect A Service

To connect a service to the global keychain (which we recommend for almost all situations) you can use:

```
$ cci service connect <service_type> <service_name>
```

If you wanted to connect to your personal GitHub account as a service you could use:

```
$ cci service connect github personal
```

CumulusCI will prompt you for the required information for the given service type.

If you want a service to only be available to a given project you can pass the `--project` flag.

```
$ cci service connect <service_type> <service_name> --project
```

### 4.7.3 Set a Default Service

The first service connected for a given service type is automatically set as the default service for that type. If you have multiple services connected for a given type and would like to set a new default use:

```
$ cci service default <service_type> <service_name>
```

### 4.7.4 Rename a Service

To rename a service use:

```
$ cci service rename <service_type> <old_name> <new_name>
```

### 4.7.5 Remove a Service

To remove a service use:

```
$ cci service remove <service_type> <service_name>
```

## 4.8 Troubleshoot Errors

Errors happen! That's why `cci` provides tools to extract error details so that they can be reported and triaged.

### 4.8.1 Report Error Logs

The `cci error gist` command sends the most recent log file to a [GitHub gist](#) so you can quickly and easily share logs with others. For this feature to work you need to make sure that your [GitHub service is set up with the proper scopes](#).

The gist includes:

- The current version of `cci`
- The current Python version
- The path to the Python executable
- `sysname` of the host (such as Darwin)
- The machine name of the host (such as x86\_64)
- The most recent log file (`cci.log`) that CumulusCI has created.

The URL for the gist is displayed in the terminal as output, and a web browser automatically opens a tab to the gist.

### 4.8.2 View Stack Traces

If you encounter an error and want more information on what caused it, the `cci error info` command displays the stack trace (if present) from the last command executed in CumulusCI.

---

**Note:** The stack trace displayed is a *Python* stacktrace. This is helpful for locating where CumulusCI encountered an error in the source code.

---

### 4.8.3 See Stack Traces Automatically

If you'd like to investigate bugs in CumulusCI, set the config option `show_stacktraces` to `True` under the `cli` section of `~/.cumulusci/cumulusci.yml`. It turns off suppression of stack traces.

Usage errors (such as incorrect command line arguments, missing files, and so on) don't show exception tracebacks because they are seldom helpful in that case.

For help with troubleshooting errors or stack traces, reach out to the CumulusCI team on the [CumulusCI Trailblazer Community Group](#).

### 4.8.4 The `--debug` Flag

All CumulusCI commands can be passed the `--debug` flag, so that:

- Any calls to CumulusCI's logger at the debug level are shown.
- Outgoing HTTP requests are logged.
- If an error is present, the corresponding stack trace is shown, and the user is dropped into a [post-mortem debugging](#) session.

---

**Note:** To exit a debugging session, type the command `quit` or `exit`.

---

### 4.8.5 Log Files

CumulusCI creates a log file every time a `cci` command runs. There are six rotating log files (`cci.log`, `cci.log1`, `..5`) with `cci.log` being the most recent. Log files are stored under `~/.cumulusci/logs` for Mac and Linux users, and `C:\Users\<Your User>\.cumulusci\logs` for Windows users.

By default, log files document:

- The last command that was entered by the user.
- All output from the command (including debug information).
- If a Python-level exception occurs, the corresponding stack trace.

If you want debug information regarding HTTP calls made during execution, you must explicitly run the command with the `--debug` flag set.

```
$ cci task run <name> --org <org> --debug
$ cci flow run <name> --org <org> --debug
```





## CONFIGURE CUMULUSCI

The `cumulusci.yml` file is located in the project root directory. This is where you define project dependencies, configure new tasks and flows, customize standard tasks and flows for your project, and so much more!

### 5.1 `cumulusci.yml` Structure

A `cumulusci.yml` file contains these top-level sections.

- **project:** Contains information about the project's associated package (if any) and GitHub repository. This section is largely generated by running `cci project init`.
- **tasks:** Defines the tasks that are available to run in your project. See [task configurations](#) for configuration options in this section.
- **flows:** Defines the flows that are available to run in your project. See [flow configurations](#) for configuration options in this section.
- **sources:** Defines other CumulusCI projects whose tasks and flows you can use in automation. See [Tasks and Flows from a Different Project](#) for more information.
- **orgs:** Defines the scratch org configurations that are available for your project. See [scratch org configurations](#) for configuration options in this section.
- **plans:** Contains any custom plans defined to install your project into a customer org. See configuring plans in MetaDeploy for more information.

The `cumulusci.yml` reference has a complete list of values that can be used in each section.

### 5.2 Task Configurations

Each task configuration under the `tasks` section of your `cumulusci.yml` file defines a task that can be run using the `cci task run` command, or included in a flow step. With a few simple changes to this section, you can configure build automation functionality to suit your project's specific needs.

### 5.2.1 Override a Task Option

If you repeatedly specify the same value for an option while running a task, you can configure CumulusCI to use that value as a default value.

For example: Let's enforce a 90% code coverage requirement for Apex code in your project. The `run_tests` task, which executes all Apex tests in a target org, can enforce code coverage at a given percentage by passing the `--required_org_code_coverage_percent` option.

```
run_tests:
  options:
    required_org_code_coverage_percent: 90
```

When the `tasks` section of the `cumulusci.yml` file specifies this option, CumulusCI overrides the default option with a value of `90`. Whenever this task is executed, its customized options apply, unless it's further configured for a particular flow step.

Verify the change by looking for a default option value when running `cci task info <name>`.

```
$ cci task info run_tests
run_tests

Description: Runs all apex tests

Class: cumulusci.tasks.apex.testrunner.RunApexTests

Command Syntax

    $ cci task run run_tests

Options
    .
    .
    .
    -o required_org_code_coverage_percent PERCENTAGE
        Optional
        Require at least X percent code coverage across the org following the test run.
        Default: 90
```

### 5.2.2 Add a Custom Task

To define a new task for your project, add the task name under the `tasks` section of your `cumulusci.yml` file.

For example, let's create a custom task named `deploy_reports` that deploys a set of reports stored in your project's unpackaged metadata located in `unpackaged/config/reports`.

First, look up the Python class associated with the standard task `deploy`. From there we see that the `deploy` task has a `class_path` value of `cumulusci.tasks.salesforce.Deploy`.

Store the task under the `tasks` section of the `cumulusci.yml` file.

```
deploy_reports:
  description: Deploy Reports
  class_path: cumulusci.tasks.salesforce.Deploy
  group: projectName
```

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```
options:
  path: unpackaged/config/reports
```

**Tip:** Be sure to include the value we retrieved for `class_path`. Also, consider adding a common `group` attribute to make it easier to see the tasks specific to your project when running `cci task list`.

Congratulations! You created a new custom task in CumulusCI.

If you've built a custom task in Python, you can make it available to the project by adding the task under the `tasks` section of the `cumulusci.yml` file. (Let's assume that your task's class is named `MyNewTaskClassName` and exists in the file `tasks/task_file.py`.)

```
tasks:
  my_new_task:
    description: Description of the task
    class_path: tasks.task_file.MyNewTaskClassName
    group: projectName
```

### 5.2.3 Use Variables for Task Options

To reference a project configuration value within the `tasks` section of the `cumulusci.yml` file, use the `$project_config` variable.

For example, NPSP uses a variable for the project's namespace by setting a value of `$project_config.project__package__namespace`. This variable is then referenced in the project's custom `deploy_qa_config` task where it's passed as the value for the `namespace_inject` option.

**Note:** A double underscore (`__`) refers to a subsequent level in the `cumulusci.yml` file.

```
deploy_qa_config:
  description: Deploys additional fields used for QA purposes only
  class_path: cumulusci.tasks.salesforce.Deploy
  group: Salesforce Metadata
  options:
    path: unpackaged/config/qa
    namespace_inject: $project_config.project__package__namespace
```

In this instance, CumulusCI replaces the variable with the value under `project -> package -> namespace` in the `cumulusci.yml` file. Here is the `project` section of NPSP's `cumulusci.yml` file specifying `npSP` as the namespace value.

```
project:
  name: Cumulus
  package:
    name: Cumulus
    name_managed: Nonprofit Success Pack
    namespace: npSP
    api_version: 48.0
    install_class: STG_InstallScript
    uninstall_class: STG_UninstallScript
```

## 5.3 Flow Configurations

Each flow configuration listed under the `flows` section of your `cumulusci.yml` file defines a flow that can be run using the `cci flow run` command, or included as a step in another flow. With a few simple changes to this section, you can configure sophisticated build automation that execute workflows throughout your development lifecycle.

### 5.3.1 Add a Custom Flow

To define a new flow for your project, add the flow name under the `flows` section of your `cumulusci.yml` file. Let's define a new `greet_and_sleep` flow:

```
greet_and_sleep:
  group: projectName
  description: Greets the user and then sleeps for 5 seconds.
  steps:
    1:
      task: command
      options:
        command: echo 'Hello there!'
    2:
      task: util_sleep
```

This flow is comprised of two tasks: `command` greets the user by echoing a string, and `util_sleep` then tells CumulusCI to sleep for five seconds.

You can reference how flows are defined in the [universal cumulusci.yml](#) file.

### 5.3.2 Add a Flow Step

To add a step to a flow, first run `cci flow info <name>` to see the existing steps. In the following example we run this for the `dev_org` flow.

```
$ cci flow info dev_org
Description: Set up an org as a development environment for unmanaged metadata
1) flow: dependencies [from current folder]
  1) task: update_dependencies
  2) task: deploy_pre
2) flow: deploy_unmanaged
  0) task: dx_convert_from
  when: project_config.project__source_format == "sfdx" and not org_config.scratch
  1) task: unschedule_apex
  2) task: update_package_xml
  when: project_config.project__source_format != "sfdx" or not org_config.scratch
  3) task: deploy
  when: project_config.project__source_format != "sfdx" or not org_config.scratch
  3.1) task: dx_push
    when: project_config.project__source_format == "sfdx" and org_config.scratch
  4) task: uninstall_packaged_incremental
  when: project_config.project__source_format != "sfdx" or not org_config.scratch
3) flow: config_dev
  1) task: deploy_post
```

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```

2) task: update_admin_profile
4) task: snapshot_changes

```

Of this flow's four steps, the first three are themselves flows, and the last is a task.

All *non-negative numbers and decimals* are valid as step numbers in a flow. You can add steps before, between, or after existing flow steps.

The following shows examples of values that you would use for the various scenarios:

- Add a step *before* step 1 by inserting a step number greater than or equal to zero and less than 1 (such as 0, 0.3, or even 0.89334).
- Add a step *between* steps 2 and 3 by inserting a step number greater than 2 or less than 3.
- Add a step *after* all steps in the flow by inserting a step number greater than 4.

You could also customize the `dev_org` flow to output an additional log line as its final step:

```

dev_org:
  steps:
    5:
      task: log
      options:
        line: dev_org flow has completed

```

### 5.3.3 Skip a Flow Step

To skip a flow step, set the task or flow for that step number to the value of `None`.

For example, to skip the fourth step of the `dev_org` flow, insert this code under the `flows` section of your `cumulusci.yml` file.

```

dev_org:
  steps:
    4:
      task: None

```

**Important:** The key `task` must be used when skipping a flow step that is a task. The key `flow` must be used when skipping a flow step that corresponds to a flow.

When CumulusCI detects a task or flow with a value of `None`, the task or flow is skipped.

```

2020-10-16 20:30:01: Starting execution
2020-10-16 20:30:01: =====
2020-10-16 20:30:01: *****
2020-10-16 20:30:01: Skipping task: None
2020-10-16 20:30:01: *****
2020-10-16 20:30:01:

```

### 5.3.4 Replace a Flow Step

To replace a flow step, name the task or flow to run instead of the current step.

For example, to replace the default fourth step of the `dev_org` flow with a custom task that loads data into a dev environment, specify the custom task to run instead.

```
dev_org:
  steps:
    4:
      task: load_data_dev
```

Or to replace the existing task with a flow as the fourth step of the `dev_org` flow, first set the task to `None` and then insert the new flow.

```
dev_org:
  steps:
    4:
      task: None
      flow: my_flow
```

Swap two steps in a flow by replacing one with the other. If the steps are of different types (task/flow), the types being replaced must first be set to `None`.

### 5.3.5 Configure Options on Tasks in Flows

Specify options on specific tasks in a flow with this syntax:

```
<flow_to_modify>:
  steps:
    <step_number>:
      flow: <sub_flow_name>
      options:
        <task>:
          <option_name>: <value>
```

Replace all objects with `<>` with the desired values.

For example, let's examine the definition of the `ci_master` flow from the universal `cumulusci.yml` file.

```
ci_master:
  group: Continuous Integration
  description: Deploy the package metadata to the packaging org and prepare for_
↳ managed package version upload. Intended for use against main branch commits.
  steps:
    1:
      flow: dependencies
      options:
        update_dependencies:
          resolution_strategy: production
    2:
      flow: deploy_packaging
    3:
      flow: config_packaging
```

This flow specifies that when the subflow dependencies runs, the `resolution_strategy` option has a value of `production` for the `update_dependencies` task (which itself executes in the dependencies subflow).

### 5.3.6 when Clauses

Specify a **when** clause in a flow step to conditionally run that step. A **when** clause is written in a Pythonic syntax that should evaluate to a boolean (True or False) result.

You can use the `project_config` object to reference values from the `cumulusci.yml` file to help with creation of the **when** clause's condition. You can use the double underscore (`__`) syntax to indicate values at subsequent levels of the file. For example, you can reference a project's namespace with `project_config.project__package__namespace`.

You can also reference values on the `org_config` object in **when** clauses. For example, it's common to reference `org_config.scratch` when building automation that needs to behave differently in a scratch org and a persistent org.

**when** clauses are frequently used in CumulusCI's standard library to conditionally run a step in a flow based on the source code format of the project. Below is the configuration for the standard library flow `build_feature_test_package`. The `update_package_xml` task will execute *only if* the project's source code format is not equal to `"sfdx"`.

```
build_feature_test_package:
  group: Release Operations
  description: Create a 2gp managed package version
  steps:
    1:
      task: update_package_xml
      when: project_config.project__source_format != "sfdx"
    2:
      task: create_package_version
      options:
        package_type: Managed
        package_name: $project_config.project__package__name Managed Feature Test
        version_base: latest_github_release
        version_type: minor
        skip_validation: True
```

See *use variables for task options* for more information.

### 5.3.7 Tasks and Flows from a Different Project

It's also possible to use tasks and flows from another project with CumulusCI. The other project must be named under the `sources` section of the project `cumulusci.yml` file.

For example, when tasks or flows are referenced using the `npssp` namespace, CumulusCI fetches the source from the NPSP GitHub repository.

```
sources:
  npssp:
    github: https://github.com/SalesforceFoundation/NPSP
```

By default, CumulusCI uses the resolution strategy `production`, which will fetch the most recent production release, or the default branch if there are no releases. By specifying `resolution_strategy`, the behavior can be changed to match desired dependency resolution behavior, such as using beta releases or retrieving feature test packages from a commit status. See *Controlling GitHub Dependency Resolution* for more details about resolution strategies.

**Note:** This feature requires that the referenced repository be readable (for example, it's public, or CumulusCI's GitHub service is configured with the token of a user who has read access to it).

---

It's also possible to fetch a specific tag...

```
sources:
  npsp:
    github: https://github.com/SalesforceFoundation/NPSP
    tag: rel/3.163
```

or a specific commit or branch. We recommend that most projects, however, use a resolution strategy.

When the repo is listed under sources, it's possible to run a task from NPSP...

```
$ cci task run npsp:robot
```

Or a flow...

```
$ cci flow run npsp:install_prod
```

Or even create a new flow that uses a flow from NPSP:

```
flows:
  install_npsp:
    steps:
      1:
        flow: npsp:install_prod
      2:
        flow: dev_org
```

This flow uses NPSP's `install_prod` flow to install NPSP as a managed package, and then run this project's own `dev_org` flow.

## 5.4 Scratch Org Configurations

This section defines the scratch org configurations that are available without explicitly running `cci org scratch` to create a new configuration. For more information on using scratch orgs with CumulusCI, see [Manage Scratch Orgs](#).

### 5.4.1 Override Default Values

---

**Note:** These overrides pertain only to scratch orgs.

---

You can override these values for your org.

- `days` (integer): Number of days for the scratch org to persist.
- `namespaced` (boolean): Is the scratch org namespaced or not. Applies only to managed package projects.
- `config_file` (string): Path to the org definition file to use when building the scratch org.



```
orgs:
  scratch:
    <org_name>:
      <key>: <value>
```

Replace all objects with <> with the desired values.

For example, override the default number of days from 7 to 15 in the dev org.

```
orgs:
  dev:
    days: 15
```

## 5.5 Configuration Scopes

CumulusCI merges multiple **YAML** files that enable configuration at several distinct scopes. All of these files have the same name, `cumulusci.yml`, but live in different locations in the file system.

You can configure files at these scope levels: *Project*, *Local Project* and *Global*. Configurations have an order of override precedence (from highest to lowest):

1. Project
2. Local Project
3. Global

One override only cascades over another when two configurations set a value for the same element on a task or flow.

Take for example, task T which takes two options, `opt1` and `opt2`.

You can specify a default value for `opt1` in your project `cumulusci.yml` file and a default value for `opt2` in your global `cumulusci.yml` file, and you'll see the expected result: both values are available in the project. (The default of `opt1` is not exposed to other projects.)

If you change your project `cumulusci.yml` file to also specify a default value for `opt2`, this new default `opt2` value takes precedence over the default `opt2` value specified in your global `cumulusci.yml` file.

### 5.5.1 Project Configurations

**macOS/Linux:** `.../path/to/project/cumulusci.yml`

**Windows:** `...\\path\\to\\project\\cumulusci.yml`

This `cumulusci.yml` file lives in the project root directory and applies solely to this project. Changes here are committed back to a remote repository so other team members can benefit from the customizations. Configurations in this file apply solely to this project, and take precedence over any configurations specified in the global `cumulusci.yml` file, but are overridden by configurations in the local project `cumulusci.yml` file.

## 5.5.2 Local Project Configurations

**macOS/Linux:** `~/.cumulusci/project_name/cumulusci.yml`

**Windows:** `%homepath%\cumulusci\project_name\cumulusci.yml`

Configurations in this `cumulusci.yml` file apply solely to the project with the given `<project_name>`, and take precedence over *all other* configuration scopes. If you want to make customizations to a project, but don't need them to be available to other team members, make those customizations here.

## 5.5.3 Global Configurations

**macOS/Linux:** `~/.cumulusci/cumulusci.yml`

**Windows:** `%homepath%\cumulusci\cumulusci.yml`

Configuration of *all* CumulusCI projects on your machine. Configurations in this file have a low precedence, and are overridden by *all other* configurations except for those that are in the universal `cumulusci.yml` file.

## 5.5.4 Universal Configurations

There is one more configuration file that exists: the `universal cumulusci.yml` file that ships with CumulusCI itself. This file actually holds the lowest precedence of all, as all other scopes override this file's contents. That said, it contains all of the definitions for the tasks, flows, and org configurations that come standard with CumulusCI.

The commands `cci task info` and `cci flow info` display all of the information about a task's or flow's configuration. They display the information in the standard library alongside any customizations defined in your `cumulusci.yml` file.

# 5.6 Advanced Configurations

## 5.6.1 Reference Task Return Values

**Attention:** Current task return values are *not* documented, so finding return values set by a specific task (if any) requires you to read the source code for the given task.

It is sometimes useful for return values to be used as input by a subsequent task in the context of a flow. Tasks can set arbitrary return values on themselves while executing. These values can then be referenced by subsequent tasks in a flow.

To reference a return value on a previous task use the following syntax:

`^^prior_task.return_value`

To discover what's available for `return_value`, find the source code for an individual task in the [CumulusCI repository](#).

For example, let's examine how CumulusCI defines the standard `upload_beta` task in the universal `cumulusci.yml` file.

```
upload_beta:
  description: Uploads a beta release of the metadata currently in the packaging org
  class_path: cumulusci.tasks.salesforce.PackageUpload
  group: Release Operations
```

To see if anything is being set on `self.return_values`, find the file that defines the class `cumulusci.tasks.salesforce.PackageUpload`. A little digging yields that this class is defined in the file `package_upload.py` and has a method called `_set_return_values()`. This method sets `self.return_values` to a dictionary with these keys: `version_number`, `version_id`, and `package_id`.

Now look at the standard `release_beta` flow defined in the universal `cumulusci.yml` file:

```
release_beta:
  description: Upload and release a beta version of the metadata currently in packaging
  steps:
    1:
      task: upload_beta
      options:
        name: Automated beta release
    2:
      task: github_release
      options:
        version: ^^upload_beta.version_number
    3:
      task: github_release_notes
      ignore_failure: True # Attempt to generate release notes but don't fail
      ↪ build
      options:
        link_pr: True
        publish: True
        tag: ^^github_release.tag_name
        include_empty: True
        version_id: ^^upload_beta.version_id
    4:
      task: github_master_to_feature
```

This flow shows how subsequent tasks can reference the return values of a prior task. In this case, the `github_release` task uses the `version_number` set by the `upload_beta` task as an option value with the `^^upload_beta.version_number` syntax. Similarly, the `github_release_notes` task uses the `version_id` set by the `upload_beta` task as an option value with the `^^upload_beta.version_id` syntax.

## 5.7 Troubleshoot Configurations

Use `cci task info <name>` and `cci flow info <name>` to see how a given task or flow behaves with current configurations.

For example, the `util_sleep` task has a `seconds` option with a default value of 5 seconds.

```
$ cci task info util_sleep
util_sleep

Description: Sleeps for N seconds
```

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```
Class: cumulusci.tasks.util.Sleep
```

**Command Syntax**

```
$ cci task run util_sleep
```

**Options**

```
-o seconds SECONDS  
Required  
The number of seconds to sleep  
Default: 5
```

To change the default value to 30 seconds for all projects on your machine, add the desired value in your `global cumulusci.yml` file.

```
tasks:  
  util_sleep:  
    options:  
      seconds: 30
```

Now `cci task info util_sleep` shows a default of 30 seconds.

```
$ cci task info util_sleep  
util_sleep
```

```
Description: Sleeps for N seconds
```

```
Class: cumulusci.tasks.util.Sleep
```

**Command Syntax**

```
$ cci task run util_sleep
```

**Options**

```
-o seconds SECONDS  
Required  
The number of seconds to sleep  
Default: 30
```

Displaying the active configuration for a given task or flow can help with cross-correlating which configuration scope affects a specific scenario.

## MANAGE SCRATCH ORGS

Scratch orgs are temporary Salesforce orgs that can be quickly set up “from scratch,” and which last for no more than 30 days. There are several reasons why scratch orgs are encouraged for development and testing over sandboxes or Developer Edition orgs. Scratch orgs:

- Provide a repeatable starting point without the challenge of managing persistent orgs’ state over time.
- Are scalable and ensure that individual, customized environments are available to everyone in the development lifecycle.
- Facilitate a fully source-driven development process built around best practices.

CumulusCI offers tools for working with all types of Salesforce orgs, but provides the most value when working with scratch orgs. CumulusCI automation helps realize the promise of scratch orgs as low cost, repeatable, source-driven environments for every phase of the product lifecycle.

This section focuses on managing scratch orgs in a CumulusCI project. To learn about managing persistent orgs, such as sandboxes, production orgs, and packaging orgs, visit the [connect persistent orgs](#) section.

### 6.1 What Is an Org in CumulusCI?

An org in CumulusCI’s keychain starts out as a named configuration, tailored for a specific purpose within the lifecycle of the project (such as development, QA, beta testing, and so on). CumulusCI creates and uses scratch orgs based on these configurations on demand. In fact, a scratch org is only generated the first time you use the scratch org. When it’s expired or been deleted, a new one can be created again with the same configuration.

CumulusCI offers tools that make it easy to discover predefined org configurations, create scratch orgs based on those configurations, and define new orgs and new configurations.

### 6.2 Set Up the Salesforce CLI

Scratch orgs in CumulusCI allow teams to be confident that the orgs they develop and test in are as close to their production environments as possible. We recommend working with scratch orgs created by Salesforce DX.

See the [Set Up SFDX](#) section for instructions.

## 6.3 Predefined Orgs

CumulusCI comes with predefined org configurations. Every project's keychain starts with these configurations ready and available to be turned into a live scratch org.

Org	Role	Definition File	Lifespan
dev	Development workflows	orgs/dev.json	7 days
qa	Testing workflows	orgs/dev.json	7 days
feature	Continuous integration	orgs/dev.json	1 day
beta	Continuous integration Hands-on testing	orgs/beta.json	1 day
release	Continuous integration Hands-on testing Product demos	orgs/release.json	1 day

To see the predefined orgs in your project:

```
$ cci org list
```

If your project has customized org configurations, your listing can include more configurations than shown in the previous table, and your project's versions of the standard configurations can be different.

## 6.4 Create a Scratch Org

To create a scratch org from a configuration, use it as the target of a command, task, or flow. CumulusCI automatically initializes orgs when they're first used.

You can create a scratch org from the dev configuration and review information about the created org with:

```
$ cci org info dev
```

When the org is created, it's associated with the name dev in the CumulusCI keychain and can be used with other commands until it expires. When an org expires or is removed, its associated configuration is left in place, and can be recreated whenever needed.

It's possible to create new orgs in the keychain that inherit their configuration from a built-in org.

Here we create a new org that uses the same configuration as the built-in org dev and has the alias myDevOrg:

```
$ cci org scratch dev myDevOrg
```

Verify that there is now an org with the name of <org\_name> that is associated with the dev configuration by running `cci org list`.

You can have as many named orgs as you wish, or none at all. Many CumulusCI users work only with built-in orgs.

### 6.4.1 Scratch Org Limits

Each scratch org you create is counted against limits in your Dev Hub. Scratch orgs count against an *active* scratch org limit, which controls how many orgs can exist at the same time, and a *daily* scratch org limit, which controls how many total orgs can be created per day.

Scratch org limits are based on your Dev Hub's edition and your Salesforce contract. To review limits and consumption, run the command:

```
$ sfdx force:limits:api:display -u <username>
```

<username> is your Dev Hub username. The limit names are ActiveScratchOrgs and DailyScratchOrgs.

## 6.5 List Orgs

When inside a project repository, run `cci org list` to see all the orgs you have configured or connected.

## 6.6 Set a Default Org

When you run a task or flow that performs work on an org, specify the org with the `--org` option.

```
$ cci flow run dev_org --org dev
```

To run many commands against the same org, set a default.

```
$ cci org default dev
$ cci flow run dev_org
```

Alternately, set a default org when creating a new named configuration by passing the `--default` flag.

```
$ cci org scratch dev <org_name> --default
```

To remove the existing default org:

```
$ cci org default dev --unset
```

## 6.7 Open Orgs in the Browser

Run `cci org browser <org_name>` to log into any org in the keychain in a new browser tab.

## 6.8 Delete Scratch Orgs

If an org defined in the keychain has created a scratch org, you can delete the scratch org but leave the configuration in the keychain to reuse it later.

```
$ cci org scratch_delete <org_name>
```

Using `scratch_delete` doesn't remove the org `<org_name>` from your org list. This default behavior lets you easily recreate scratch orgs from a stored, standardized configuration.

To permanently remove an org from the org list, and also delete the associated scratch org:

```
$ cci org remove <org_name>
```

It's not necessary to explicitly remove or delete expired orgs. CumulusCI recreates an expired org the first time you attempt to use it. To clean up expired orgs from the keychain:

```
$ cci org prune
```

## 6.9 Configure Predefined Orgs

Projects can customize the set of configurations available out of the box, and add further predefined orgs to meet project-specific needs.

An org configuration has a name, such as `dev` or `qa`, and is defined by options set in the `cumulusci.yml` file as well as in the contents of a specific `.json` scratch org definition file in the `orgs` directory. For orgs like `dev` and `qa` that are predefined for all projects, the configuration is located in the CumulusCI standard library, but can be customized by projects in the `cumulusci.yml` file.

When developing a managed package project, it is often useful to test inside of a namespaced scratch org. Many projects configure an org called `dev_namespaced`, a developer org that has a namespace. This org is defined under the `orgs__scratch` section in the `cumulusci.yml` file.

```
orgs:
  scratch:
    dev_namespaced:
      config_file: orgs/dev.json
      days: 7
      namespaced: True
```

This org uses the same scratch org definition file as the `dev` org, but has a different configuration in the `cumulusci.yml` file, resulting in a different org shape and a different use case. The key facets of the org shape that are defined in the `cumulusci.yml` file are whether or not the org has a namespace, and the length of the org's lifespan.

Org definition files stored in the `orgs` directory are configured as specified in the [Salesforce DX Developer Guide](#).

Many projects never add a new org definition `.json` file, and instead add specific features and settings to the files shipped with CumulusCI. However, new definitions can be added and referenced under the `orgs__scratch` section of the `cumulusci.yml` file to establish org configurations that are completely customized for a project.



## 6.10 Import an Org from the Salesforce CLI

CumulusCI can import existing orgs from the Salesforce CLI keychain.

```
$ cci org import <sfdx_alias> <cci_alias>
```

For `sfdx_alias`, specify the alias or username of the org in the Salesforce CLI keychain. For `cci_alias`, provide the name to use in CumulusCI's keychain.

---

**Important:** CumulusCI cannot automatically refresh orgs imported from Salesforce CLI when they expire.

---

## 6.11 Use a Non-Default Dev Hub

By default, CumulusCI creates scratch orgs using the DevHub org configured as the `defaultdevhubusername` in `sfdx`. Switch to a different DevHub org within a project by configuring the `devhub` service.

```
$ cci service connect devhub mydevhub --project
Username: <DevHub username>
devhub is now configured for this project.
```



## CONNECT PERSISTENT ORGS

In addition to creating *scratch orgs* in CumulusCI, you can connect persistent orgs to your project to run tasks and flows on them. This feature supports use cases such as deploying to a Developer Edition org to release a package version, or installing to a sandbox for user acceptance testing.

**Attention:** A different setup is required to connect to orgs in the context of an automated build. See *continuous integration* for more information.

### 7.1 The `org connect` Command

To connect to a persistent org:

```
$ cci org connect <org_name>
```

This command automatically opens a browser window pointed to a Salesforce login page. The provided `<org_name>` is the alias that CumulusCI will assign to the persistent org.

---

**Note:** Connecting an org via `cci org connect` does *not* expose that org to the Salesforce CLI.

---

If your org has a custom domain, use the `--login-url` option along with the corresponding login url.

```
cci org connect <org_name> --login-url https://example.my.domain.salesforce.com
```

#### 7.1.1 Production and Developer Edition Orgs

No options are needed for these org types. Just run the same command you normally would to connect to a persistent org.

```
$ cci org connect <org_name>
```

## 7.1.2 Sandboxes

For sandboxes, pass the `--sandbox` flag along with the org name.

```
$ cci org connect <org_name> --sandbox
```

---

**Note:** The `--sandbox` flag can also be used for connecting a scratch org created externally to CumulusCI.

---

## 7.2 Verify Your Connected Orgs

Run `cci org list` to see your org listed under the “Connected Org” table. This example output shows a single persistent org connected to CumulusCI with the name `devhub`.

```
$ cci org list
```

Scratch Orgs—

Name	Default	Days	Expired	Config	Domain
dev		7	X	dev	
feature		1	X	feature	
prerelease		1	X	prerelease	
qa		7	X	qa	
release		1	X	release	

Connected Orgs—

Name	Default	Username	Expires
devhub		j.holt@mydomain.devhub	Persistent

Verify a successful connection to the org by logging in.

```
$ cci org browser <org_name>
```

## 7.3 Global Orgs

By default, `cci org connect` stores the OAuth credentials for connected orgs in a *project-specific* keychain. Using a project-specific keychain means that an org connected in Project A’s directory isn’t available when you’re working in Project B’s directory.

Connect an org and make it available to *all* CumulusCI projects on your computer by passing the `--global-org` flag.

```
$ cci org connect <org_name> --global-org
```

## 7.4 Use a Custom Connected App

CumulusCI uses a preconfigured Connected App to authenticate to Salesforce orgs that use OAuth2. In most cases this preconfigured app is all you need to authenticate into orgs. To control the Connected App for specific security or compliance requirements (such as adding a private key to sign a certificate connected with the configuration, or enforcing restrictions on user activity), create your own Connected App and configure CumulusCI to use it when connecting to orgs.

To create a custom Connected App, run the `connected_app` task, and then manually [edit its configuration](#) to suit your requirements.

---

**Important:** Make sure to create the Connected App in a production org!

---

This command will create a Connected App in the Dev Hub org connected to `sfdx` with the label `cumulusci` and set it as the `connected_app` service in CumulusCI.

```
$ cci task run connected_app --label cumulusci --connect true
```

After the Connected App has been created, verify that it's connected to CumulusCI.

```
$ cci service list
+Services-----+
| Name          Description                                     |
|               Configured |
+-----+-----+
| connected_app A Connected App is required to connect to and run commands against_
|               persistent orgs. ✓ |
| devhub        Configure which SFDX org to use as a Dev Hub for creating scratch orgs _
|               ✓ |
| github        Configure connection for github tasks, e.g. Create Release _
|               ✓ |
| metaci        Connect with a MetaCI site to run builds of projects from this_
|               repository |
| metadeploy    Connect with a MetaDeploy site to publish installers from this_
|               repository ✓ |
| apextestsdb   Configure connection for ApexTestsDB tasks, e.g. ApextestsdbUpload _
|               |
| saucelabs     Configure connection for saucelabs tasks. _
|               |
+-----+-----+
```

To edit the Connected App's OAuth scopes:

1. In Lightning Experience, go to Setup → Apps → Apps Manager.
2. Click the arrow on the far right side of the row that pertains to the newly created Connected App.
3. Click "Edit."
4. Add or remove OAuth scopes as desired.

For a full list of options, run the `connected_app` task reference documentation.



## DEVELOP A PROJECT

A general overview on how to develop a Salesforce project with CumulusCI.

### 8.1 Set Up a Dev Org

The `dev_org` flow creates an org to develop on by moving all metadata (managed and unmanaged) into the org, and configuring it to be ready for development.

---

**Tip:** Run `cci flow info dev_org` for a full list of the `dev_org` flow steps.

---

To run the `dev_org` flow against the project's *default org*:

```
$ cci flow run dev_org
```

To run the `dev_org` flow against a specific org, use the `--org` option. The following runs the `dev_org` flow against the org named `dev`.

```
$ cci flow run dev_org --org dev
```

Open the new dev org to begin development.

```
$ cci org browser dev
```

### 8.2 List Changes

To see what components have changed in a target org use the `list_changes` task:

```
$ cci task run list_changes --org dev
```

---

#### Wizard Note

This functionality relies on Salesforce's [source tracking](#) feature, which is currently available only in Scratch Orgs, Developer Sandboxes, and Developer Pro Sandboxes.

---

For more information, see [List and Retrieve Options](#).

## 8.3 Retrieve Changes

The `retrieve_changes` task supports both Salesforce DX and Metadata API-format source code. It utilizes the `Source-Member sObject` to detect what has changed in an org, and also gives you discretion regarding which components are retrieved when compared to the `dx_pull` task.

To retrieve *all* changes in an org:

```
$ cci task run retrieve_changes --org dev
```

For information on retrieving specific subsets of changes, see [List and Retrieve Options](#).

### 8.3.1 --path

Manual tracking of component versions offers the possibility of retrieving one set of changes into directory A, and retrieving a different set of changes into directory B. By default, changes are retrieved into the `src` directory when using Metadata API source format, or the default package directory (`force-app`) when using Salesforce DX source format.

To retrieve metadata into a *different* location use the `--path` option:

```
$ cci task run retrieve_changes --org dev --path your/unique/path
```

## 8.4 List and Retrieve Options

When developing in an org, the changes you're most interested in are sometimes mixed with other changes that aren't relevant to what you're doing.

For example, changing metadata like Custom Objects and Custom Fields often results in changes to Page Layouts and Profiles that you don't wish to review or retrieve.

It's a common workflow in CumulusCI to use the `list_changes` task, combined with the options featured in this subsection, to narrow the scope of changes in the org to the exact elements you desire to retrieve in your project. When the correct set of metadata is listed, run the `retrieve_changes` task to bring those changes into the repository.

### 8.4.1 --include & --exclude

When retrieving metadata from an org, CumulusCI represents each component name as the combination of its type (such as a `Profile`, `CustomObject`, or `ApexClass`) and its API name: `MemberType: MemberName`. An `ApexClass` named `MyTestClass` would be represented as `ApexClass: MyTestClass`.

The `--include` and `--exclude` options lets you pass multiple [regular expressions](#) to match against the names of changed components. This metadata is either included or excluded depending on which option the regular expression is passed. Multiple regular expressions can be passed in a comma-separated list.

The following lists all modified metadata that ends in "Test" and "Data" in the default org.

```
$ cci task run list_changes --include "Test$,Data$"
```

Since the metadata string that CumulusCI processes also includes the `MemberType`, use exclusions and inclusions that filter whole types of metadata.

The following will list all changes *except for* those with a type of `Profile`.



```
$ cci task run list_changes --exclude "^Profile: "
```

### 8.4.2 --types

To list or retrieve changed metadata of the same type, use the `--types` option along with the `metadata type` to retrieve. The following retrieves all changed `ApexClass` and `ApexComponent` entities in the default org.

```
$ cci task run retrieve_changes --types ApexClass,ApexComponent
```

## 8.5 Push Changes

Developers often use an editor or IDE like Visual Studio Code to modify code and metadata stored in the repository. After making changes in an editor, push these changes from your project's local repository to the target org.

If your project uses the Salesforce DX source format, use the `dx_push` task.

```
$ cci task run dx_push
```

If your project uses the Metadata API source format, use the `deploy` task:

```
$ cci task run deploy
```

The `deploy` task has *many* options for handling a number of different scenarios. For a comprehensive list of options, see the `deploy` task reference.

## 8.6 Run Apex Tests

CumulusCI can execute Apex tests in an org with the `run_tests` task, and optionally report on test outcomes and code coverage. Failed tests can also be retried automatically.

```
$ cci task run run_tests --org <org_name>
```

The `run_tests` task has *many* options for running tests. For a comprehensive list of options and examples, see the `run_tests` task reference.

## 8.7 Set Up a QA Org

The `qa_org` flow sets up org environments where quality engineers test features quickly and easily. `qa_org` runs the specialized `config_qa` flow after deploying the project's unmanaged metadata to the org.

The following runs the `qa_org` flow against the `qa` org.

```
$ cci flow run qa_org --org qa
```

## 8.7.1 Create QA Configurations

Out of the box, and even in some active projects, the `config_dev` and `config_qa` flows are the same. Many teams have a requirement for additional configurations to be deployed when performing QA, but not when developing a new feature.

At Salesforce.org, our product teams often modify the `config_qa` flow to deploy configurations that pertain to large optional features in a package. These configurations are subsequently tested by the product's Robot Framework test suites.

To retrieve your own QA configurations, spin up a new org:

```
$ cci flow run qa_org
```

Make the necessary changes, and run:

```
$ cci task run retrieve_qa_config
```

This task defaults to retrieving this metadata under `unpackaged/config/qa`.

---

**Tip:** The configuration metadata can also be stored in a different location by using the `--path` option.

---

To delete the org...

```
$ cci org remove qa
```

Then re-create it...

```
$ cci flow run qa_org --org qa
```

Then run the `deploy_qa_config` to deploy the previously retrieved configurations to the org.

```
$ cci task run deploy_qa_config --org qa
```

To require that the `qa_org` flow always runs this task, add a `deploy_qa_config` task step under the `flows__config_qa` section of the `cumulusci.yml` file.

```
config_qa:
  steps:
    3:
      task: deploy_qa_config
```

Now `config_qa` (which is included in the `qa_org` flow) executes the `deploy_qa_config` task as the third step in the flow.

## 8.8 Manage Dependencies

CumulusCI is built to automate the complexities of dependency management for projects that extend and implement managed packages. CumulusCI currently handles these main types of dependencies for projects.

- **GitHub Repository:** Dynamically resolve a product release, and its own dependencies, from a CumulusCI project on GitHub.
- **Packages:** Require a specific version of a managed package or unlocked package.
- **Unmanaged Metadata:** Require the deployment of unmanaged metadata.

Dependencies are listed in the `project__dependencies` section of `cumulusci.yml`

```
project:
  dependencies:
```

The `update_dependencies` task handles deploying dependencies to a target org, and is included in all flows designed to deploy or install to an org, such as `dev_org`, `qa_org`, `install_prod`, and others.

To run the `update_dependencies` task manually:

```
$ cci task run update_dependencies
```

### 8.8.1 GitHub Repository Dependencies

GitHub repository dependencies create a dynamic dependency between the current project and another CumulusCI project on GitHub. This is an example of listing Salesforce.org's [EDA](#) product as a dependency.

```
project:
  dependencies:
    - github: https://github.com/SalesforceFoundation/EDA
```

When `update_dependencies` runs, these steps are taken against the referenced repository.

- Look for the `cumulusci.yml` file and parse if found.
- Determine if the project has subfolders under `unpackaged/pre`. If found, deploy them first, in alphabetical order.
- Determine if the project specifies any dependencies in the `cumulusci.yml` file. If found, recursively resolve those dependencies and any dependencies belonging to them.
- **Determine whether to install the project as as a managed package or unmanaged metadata:**
  - If the project has a namespace configured in the `cumulusci.yml` file, treat the project as a managed package unless the `unmanaged` option is set to `True` in the dependency.
  - If the project has a namespace and is *not* configured as unmanaged, use the GitHub API to locate the latest managed release of the project and install it.
- If the project is an unmanaged dependency, the main source directory is deployed as unmanaged metadata.
- Determine if the project has subfolders under `unpackaged/post`. If found, deploy them next, in alphabetical order. Namespace tokens are replaced with `<namespace>__` if the project is being installed as a managed package, or an empty string otherwise.

## Reference Unmanaged Projects

If the referenced repository does not have a namespace configured, or if the dependency specifies the `unmanaged` option as `True`, the repository is treated as unmanaged.

Here is a project with Salesforce.org's [EDA](#) package listed as an unmanaged dependency:

```
project:
  dependencies:
    - github: https://github.com/SalesforceFoundation/EDA
      unmanaged: True
```

The EDA repository is configured for a namespace, but the dependency specifies `unmanaged: True`, so EDA deploys as unmanaged metadata.

CumulusCI only supports unmanaged repositories in Metadata API source format at present.

## Reference a Specific Tag

To reference a specific version of the product other than the most recent commit on the main branch (for unmanaged projects) or the most recent production release (for managed packages), use the `tag` option to specify a tag from the target repository. This option is useful for testing against specific package versions, pinning a dependency to a version rather than using the latest release, and recreating org environments for debugging.

```
project:
  dependencies:
    - github: https://github.com/SalesforceFoundation/EDA
      tag: rel/1.105
```

The EDA repository's tag `rel/1.105` is used instead of the latest production release of EDA (1.111, for this example).

## Skip unpackaged/\* in Reference Repositories

If the referenced repository has unpackaged metadata under `unpackaged/pre` or `unpackaged/post`, use the `skip` option to skip deploying that metadata with the dependency.

```
project:
  dependencies:
    - github: https://github.com/SalesforceFoundation/EDA
      skip: unpackaged/post/course_connection_record_types
```

## 8.8.2 Package Dependencies

Managed package and unlocked package dependencies are rather simple. Under the `project__dependencies` section of the `cumulusci.yml` file, specify the namespace of the target package, and the required version number, or specify the package version id.

```
project:
  dependencies:
    - namespace: npe01
      version: 3.6
    - version_id: 04t000000000000001
```

Package dependencies can include any package, whether or not it is built as a CumulusCI project. Dependencies on managed packages may be specified using the namespace and version or the version id. Dependencies on unlocked packages should use the version id.

### 8.8.3 Package Install Keys (Passwords)

Some packages are protected by an install key, which must be present in order to install the package. CumulusCI dependencies can use the `password_env_name` key to instruct CumulusCI to retrieve the package install key from an environment variable. This key is available on both package version dependencies and on GitHub dependencies:

```
project:
  dependencies:
    - namespace: my_namespace
      version: 3.6
      password_env_name: INSTALL_KEY
    - github: https://github.com/MyOrg/MyRepo
      password_env_name: MY_REPO_KEY
```

### 8.8.4 Unmanaged Metadata Dependencies

Specify unmanaged metadata to be deployed by specifying a `zip_url` or a `github` URL, and, optionally, `subfolder`, `namespace_inject`, `namespace_strip`, and `unmanaged` under the `project__dependencies` section of the `cumulusci.yml` file.

```
project:
  dependencies:
    - zip_url: https://SOME_HOST/metadata.zip
    - github: https://github.com/SalesforceFoundation/EDA
      subfolder: unpackaged/post/course_connection_record_types
      ref: 0cabfe
```

When the `update_dependencies` task runs, it downloads the zip file or GitHub subdirectory and deploys it via the Metadata API. The zip file must contain valid metadata for use with a deploy, including a `package.xml` file in the root.

Unmanaged metadata dependencies from GitHub may optionally specify the `ref` to download. If they do not, unmanaged GitHub dependencies are resolved like other GitHub references. See [Controlling GitHub Dependency Resolution](#) for more details on resolution of dynamic dependencies.

---

**Note:** In versions of CumulusCI prior to 3.33.0, unmanaged GitHub dependencies always deployed the most recent commit on the default branch.

---

## Specify a Subfolder

Use the `subfolder` option to specify a subfolder of the zip file or GitHub repository to use for the deployment.

---

**Tip:** This option is handy when referring to metadata stored in a GitHub repository.

---

When `update_dependencies` runs, it still downloads the zip from `zip_url`, but then builds a new zip containing only the content of `subfolder`, starting inside `subfolder` as the zip's root.

## Inject Namespace Prefixes

CumulusCI has support for tokenizing references to a package's namespace prefix in code. When tokenized, all occurrences of the namespace prefix, are replaced with `%%NAMESPACE%%` inside of files and `___NAMESPACE___` in file names. The `namespace_inject` option instructs CumulusCI to replace these tokens with the specified namespace before deploying the unpackaged dependency.

For more on this topic see [Namespace Injection](#).

## 8.8.5 Controlling GitHub Dependency Resolution

CumulusCI converts dynamic dependencies specified via GitHub repositories into specific package versions and commit references by applying one or more *resolvers*. You can customize the resolvers that CumulusCI applies to control when it will use beta managed packages or second-generation feature test packages, or to intervene more deeply in the dependency resolution process.

CumulusCI organizes resolvers into *resolution strategies*, which are named, ordered lists of resolvers to apply. When CumulusCI applies a resolution strategy to a dependency, it applies each resolver from top to bottom until a resolver succeeds in resolving the dependency.

Three resolution strategies are provided in the CumulusCI standard library:

- `latest_release`, which will attempt to resolve to the latest managed release of a managed package project.
- `include_beta`, which will attempt to resolve to the latest beta, if any, or managed release of a managed package project.
- `commit_status`, which will resolve to second-generation package betas created on feature branches, if any, before falling back to managed package releases. This strategy is used only in the `qa_org_2gp` and `ci_feature_2gp` flows.

The complete list of steps taken by each resolution strategy is given below.

Each flow that resolves dependencies selects a resolution strategy that meets its needs. Two aliases, `production`, and `preproduction`, are defined for this purpose, because in many cases a development flow like `dev_org` or `install_beta` will want to utilize a *different* resolution strategy than a production flow like `ci_master` or `install_prod`.

By default, both `production` and `preproduction` use the `latest_release` resolution strategy. To opt to have development flows use beta versions of managed package dependencies, you can switch the `preproduction` alias to point to the `include_beta` resolution strategy:

```
project:
  dependency_resolutions:
    preproduction: include_beta
    production: latest_release
```

After this change, flows like `dev_org` will install beta releases of dependencies, if present.

## Resolution Strategy Details

The standard resolution strategies execute the following steps to resolve a dependency:

### **commit\_status:**

This resolution strategy is suitable for feature builds on products that utilize a release branch model and build second-generation package betas (using the `build_feature_test_package` flow) on each commit.

- If a `tag` is present, use the commit for that tag, and any package version found there. (Resolver: `tag`)
- If the current branch is a release branch (`feature/NNN`, where `feature/` is the feature branch prefix and `NNN` is any integer) or a child branch of a release branch, locate a branch with the same name in the dependency repository. If a commit status contains a beta package Id for any of the first five commits on that branch, use that commit and package. (Resolver: `commit_status_exact_branch`)
- If the current branch is a release branch (`feature/NNN`, where `feature/` is the feature branch prefix and `NNN` is any integer) or a child branch of a release branch, locate a matching release branch (`feature/NNN`) in the dependency repository. If a commit status contains a beta package Id for any of the first five commits on that branch, use that commit and package. (Resolver: `commit_status_release_branch`)
- If the current branch is a release branch (`feature/NNN`, where `feature/` is the feature branch prefix and `NNN` is any integer) or a child branch of a release branch, locate a branch for either of the two previous releases (e.g., `feature/230` in this repository would search `feature/229` and `feature/228`) in the dependency repository. If a commit status contains a beta package Id for any of the first five commits on that branch, use that commit and package. (Resolver: `commit_status_previous_release_branch`)
- Identify the most recent beta package release via the GitHub Releases section. If located, use that package and commit. (Resolver: `latest_beta`)
- Identify the most recent production package release via the GitHub Releases section. If located, use that package and commit. (Resolver: `latest_release`)
- Use the most recent commit on the repository's main branch as an unmanaged dependency. (Resolver: `unmanaged`)

### **include\_beta:**

This resolution strategy is suitable for any pre-production build for products that wish to consume beta releases of their dependencies during development and testing.

- If a `tag` is present, use the commit for that tag, and any package version found there. (Resolver: `tag`)
- Identify the most recent beta package release via the GitHub Releases section. If located, use that package and commit. (Resolver: `latest_beta`)
- Identify the most recent production package release via the GitHub Releases section. If located, use that package and commit. (Resolver: `latest_release`)
- Use the most recent commit on the repository's main branch as an unmanaged dependency. (Resolver: `unmanaged`)

### **latest\_release:**

This resolution strategy is suitable for any build for products that wish to consume production releases of their dependencies during development and testing. It is also suitable for production flows (such as `install_prod` or a MetaDeploy installer flow) for all products.

- If a `tag` is present, use the commit for that tag, and any package version found there. (Resolver: `tag`)

- Identify the most recent production package release via the GitHub Releases section. If located, use that package and commit. (Resolver: `latest_release`)
- Use the most recent commit on the repository's main branch as an unmanaged dependency. (Resolver: `unmanaged`)

## Customizing Resolution Strategies

Projects that require deep control of how dependencies are resolved can create custom resolution strategies.

To add a resolution strategy, add a list of the resolvers desired to the section `project__dependency_resolutions__resolution_strategies` in `cumulusci.yml`. For example:

```
dependency_resolutions:
  production: releases_only
  resolution_strategies:
    releases_only:
      - latest_release
```

would create a new resolution strategy called `releases_only` that *only* can resolve to a production release. (Dependencies without a production release would cause a failure). It also assigns the alias `production` to point to `releases_only`, meaning that standard flows like `install_prod` would use this resolution strategy.

Customizing resolution strategies is an advanced topic. The out-of-the-box resolution strategies provided with CumulusCI will cover the needs of most projects. However, this capability is available for projects that need it.

### 8.8.6 Automatic Cleaning of `meta.xml` Files on Deploy

To let CumulusCI fully manage the project's dependencies, the `deploy` task (and other tasks based on `cumulusci.tasks.salesforce.Deploy`, or subclasses of it) automatically removes the `<packageVersion>` element and its children from all `meta.xml` files in the deployed metadata. Removing these elements does not affect the files on the filesystem.

This feature supports CumulusCI's automatic dependency resolution by avoiding a need for projects to manually update XML files to reflect current dependency package versions.

---

**Note:** If the metadata being deployed references namespaced metadata that does not exist in the currently installed package, the deployment throws an error as expected.

---

---

**Tip:** The automatic cleaning of `meta.xml` files can be disabled by setting the `clean_meta_xml` option to `False`.

---

Developers can also use the `meta_xml_dependencies` task to update the `meta.xml` files locally using the versions from CumulusCI's calculated project dependencies.



## 8.9 Use Tasks and Flows from a Different Project

Dependency handling is used in a very specific context: to install dependency packages or metadata bundles in a dependencies flow that is a component of some other flow.

CumulusCI also makes it possible to use automation (tasks and flows) from another CumulusCI project. This feature supports many use cases, including:

- Applying configuration from a dependency project, rather than just installing the package.
- Running Robot Framework tests that are defined in a dependency.

For more information, see how to *Tasks and Flows from a Different Project*.



---

## AUTOMATE DATA OPERATIONS

CumulusCI offers a suite of tasks to help you to manage data as part of your project automation. Within your repository, you can define one or several *datasets*, collections of data you use for specific purposes. CumulusCI tasks support extracting defined datasets from scratch orgs or persistent orgs, storing those snapshots within the repository, and automating the load of datasets into orgs. Data operations are executed via the Bulk and REST APIs.

A dataset consists of

- a *definition file*, written in YAML, which specifies the sObjects and fields contained in the dataset and the order in which they are loaded or extracted from an org.
- a *storage location*, which may take the form of a SQL database (typically, a SQLite file stored within the repository, although external databases are supported) or a SQL script file.

Datasets are stored in the `datasets/` folder within a repository by default. Projects created with a recent version of CumulusCI ship with this directory in place.

### 9.1 The Lifecycle of a Dataset

A dataset starts with a definition: which objects, and which fields, are to be captured, persisted, and loaded into orgs? (The details of definition file format are covered below).

With a definition available, the dataset may be captured from an org into the repository. A captured dataset may be stored under version control and incorporated into project automation, loaded as part of flows during org builds or at need. As the project's needs evolve, datasets may be re-captured from orgs and versioned alongside the project metadata.

Projects may define one or many datasets. Datasets can contain an arbitrary amount of data.

### 9.2 Defining Datasets

A dataset is defined in YAML as a series of steps. Each step registers a specific sObject as part of the dataset, and defines the relevant fields on that sObject as well as its relationships to other sObjects that are included in the data set.

**Note:** this section discusses how to define a dataset and the format of the definition file. In many cases, it's easier to use the `generate_dataset_mapping` task than to create this definition by hand. See below for more details.

A simple dataset definition looks like this:

```
Accounts:
  sf_object: Account
  fields:
    - Name
    - Description
    - RecordTypeId
  lookups:
    ParentId:
      table: Account
      after: Accounts
Contacts:
  sf_object: Contact
  fields:
    - FirstName
    - LastName
    - Email
  lookups:
    AccountId:
      table: Account
```

This example defines two steps: `Accounts` and `Contacts`. (The names of steps are arbitrary). Each step governs the extraction or load of records in the sObject denoted in its `sf_object` property.

Relationships are defined in the `lookups` section. Each key within `lookups` is the API name of the relationship field. Beneath, the `table` key defines the stored table to which this relationship refers.

CumulusCI loads steps in order. However, sObjects earlier in the sequence of steps may include lookups to sObjects loaded later, or to themselves. For these cases, the `after` key may be included in a lookup definition, with a value set to the name of the step after which the referenced record is expected to be available. CumulusCI will defer populating the lookup field until the referenced step has been completed. In the example above, an `after` definition is used to support the `ParentId` self-lookup on `Account`.

### 9.2.1 API Selection

By default, CumulusCI will determine the data volume of the specified object and select an API for you: for under 2,000 records, the REST Collections API is used; for more, the Bulk API is used. The Bulk API is also used for delete operations where the hard delete operation is requested, as this is available only in the Bulk API. Smart API selection helps increase speed for low- and moderate-volume data loads.

To prefer a specific API, set the `api` key within any mapping step; allowed values are `"rest"`, `"bulk"`, and `"smart"`, the default.

CumulusCI defaults to using the Bulk API in Parallel mode. If required to avoid row locks, specify the key `bulk_mode: Serial` in each step requiring the use of serial mode.

For all API modes, you can specify a batch size using the `batch_size` key. Allowed values are between 1 and 200 for the REST API and 1 and 10,000 for the Bulk API.

Note that the semantics of batch sizes differ somewhat between the REST API and the Bulk API. In the REST API, the batch size is the size of upload batches and also the actual size of individual transactions. In the Bulk API, the batch size is the maximum record count in a Bulk API upload batch, which is subject to its own limits, including restrictions on total processing time. Bulk API batches are automatically chunked further into transactions by the platform, and the transaction size cannot be controlled.

## 9.2.2 Database Mapping

CumulusCI's definition format includes considerable flexibility for use cases where datasets are stored in SQL databases whose structure is not identical to the Salesforce database. Salesforce objects may be assigned to arbitrary database tables, and Salesforce field names mapped to arbitrary columns.

For new mappings, it's recommended to allow CumulusCI to use sensible defaults by specifying only the Salesforce entities. Legacy datasets are likely to include explicit database mappings, which would look like this for the same data model as above:

```
Accounts:
  sf_object: Account
  table: Account
  fields:
    Name: Name
    Description: Description
    RecordTypeId: RecordTypeId
  lookups:
    ParentId:
      table: Account
      after: Accounts
Contacts:
  sf_object: Contact
  table: Contact
  fields:
    FirstName: FirstName
    LastName: LastName
    Email: Email
  lookups:
    AccountId:
      table: Account
```

Note that in this version, fields are specified as a colon-separated mapping, not a list. Each pair in the field map is structured as Salesforce API Name: Database Column Name. Additionally, each object has a `table` key to specify the underlying database table.

New mappings that do not connect to an external SQL database (that is, mappings which simply extract and load data between Salesforce orgs) should not need to use this feature, and new mappings that are generated by CumulusCI use the simpler version shown above. Existing mappings may be converted to this streamlined style in most cases by loading the existing dataset, modifying the mapping file, and then extracting a fresh copy of the data. Note however that datasets which make use of older and deprecated CumulusCI features, such as the `record_type` key, may need to continue using explicit database mapping.

## 9.2.3 Record Types

CumulusCI supports automatic mapping of Record Types between orgs, keyed upon the Developer Name. To take advantage of this support, simply include the `RecordTypeId` field in any step. CumulusCI will transparently extract Record Type information during dataset capture and map Record Types by Developer Name into target orgs during loads.

Older dataset definitions may also use a `record_type` key:

```
Accounts:
  sf_object: Account
```

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```
fields:
  - Name
record_type: Organization
```

This feature limits extraction to records possessing that specific Record Type, and assigns the same Record Type upon load.

It's recommended that new datasets use Record Type mapping by including the `RecordTypeId` field. Using `record_type` will result in CumulusCI issuing a warning.

### 9.2.4 Relative Dates

CumulusCI supports maintaining *relative dates*, helping to keep the dataset relevant by ensuring that date and date-time fields are updated when loaded.

Relative dates are enabled by defining an *anchor date*, which is specified in each mapping step with the `anchor_date` key, whose value is a date in the format `2020-07-01`.

When you specify a relative date, CumulusCI modifies all date and date-time fields on the object such that when loaded, they have the same relationship to today as they did to the anchor date. Hence, given a stored date of 2020-07-10 and an anchor date of 2020-07-01, if you perform a load on 2020-09-10, the date field will be rendered as 2020-09-19 - nine days ahead of today's date, as it was nine days ahead of the anchor date.

Relative dates are also adjusted upon extract so that they remain stable. Extracting the same data mentioned above would result in CumulusCI adjusting the date back to 2020-07-10 for storage, keeping it relative to the anchor date.

Relative dating is applied to all date and date-time fields on any mapping step that contains the `anchor_date` clause. If orgs are [configured](#) to permit setting audit fields upon record creation and the appropriate user permission is enabled, CumulusCI can apply relative dating to audit fields, such as `CreatedDate`. For more about how to automate that setup, review the `create_bulk_data_permission_set` task below.

For example, this mapping step:

```
Contacts:
  sf_object: Contact
  fields:
    - FirstName
    - LastName
    - Birthdate
  anchor_date: 1990-07-01
```

would adjust the `Birthdate` field on both load and extract around the anchor date of July 1, 1990. Note that date and datetime fields not mapped, as well as fields on other steps, are unaffected.

### 9.2.5 Person Accounts

CumulusCI supports extracting and loading person account data. In your dataset definition, map person account fields like `LastName`, `PersonBirthdate`, or `CustomContactField__pc` to **Account** steps (i.e. where `sf_object` equals **Account**).

```
Account:
  sf_object: Account
  table: Account
  fields:
```

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```
# Business Account Fields
- Name
- AccountNumber
- BillingStreet
- BillingCity

# Person Account Fields
- FirstName
- LastName
- PersonEmail
- CustomContactField__pc

# Optional (though recommended) Record Type
- RecordTypeId
```

## Record Types

It's recommended, though not required, to extract Account Record Types to support datasets with person accounts so there is consistency in the Account record types loaded. If Account RecordTypeId is not extracted, the default business account Record Type and default person account Record Type will be applied to business and person account records respectively.

## Extract

During dataset extraction, if the org has person accounts enabled, the IsPersonAccount field is extracted for **Account** and **Contact** records so CumulusCI can properly load these records later. Additionally, Account .Name is not createable for person account **Account** records, so Account .Name is not extracted for person account **Account** records.

## Load

Before loading, CumulusCI checks if the dataset contains any person account records (i.e. any **Account** or **Contact** records with IsPersonAccount as true). If the dataset does contain any person account records, CumulusCI validates the org has person accounts enabled.

You can enable person accounts for scratch orgs by including the [PersonAccounts](#) feature in your scratch org definition.

## 9.2.6 Advanced Features

CumulusCI supports two additional keys within each step

The `filters` key encompasses filters applied to the SQL data store when loading data. Use of `filters` can support use cases where only a subset of stored data should be loaded.

```
filters:
  - 'SQL string'
```

Note that `filters` uses SQL syntax, not SOQL. Filters do not perform filtration or data subsetting upon extraction; they only impact loading. This is an advanced feature.

The `static` key allows individual fields to be populated with a fixed, static value.

```
static:
  CustomCheckbox__c: True
  CustomDateField__c: 2019-01-01
```

The `soql_filter` key allows to specify a WHERE clause that should be used when extracting data from your Salesforce org:

**Account:** `sf_object: Account table: Account fields:`

- Name
- Industry
- Type

`soql_filter: "Industry = 'Higher Education' OR Type = 'Higher Education'"`

Note that trying to load data that is extracted using `soql_filter` may cause “invalid cross reference id” errors if related object records are filtered on extract. Use this feature only if you fully understand how [CumulusCI load data task](#) resolves references to related records when loading data to a Salesforce org.

## Primary Keys

CumulusCI offers two modes of managing Salesforce Ids and primary keys within the stored database.

If the `fields` list for an sObject contains a mapping:

```
Id: sf_id
```

CumulusCI will extract the Salesforce Id for each record and use that Id as the primary key in the stored database.

If no such mapping is provided, CumulusCI will remove the Salesforce Id from extracted data and replace it with an autoincrementing integer primary key.

Use of integer primary keys may help yield more readable text diffs when storing data in SQL script format. However, it comes at some performance penalty when extracting data. It’s recommended that most mappings do not map the Id field and allow CumulusCI to utilize the automatic primary key.

## Handling Namespaces

All CumulusCI bulk data tasks support automatic namespace injection or removal. In other words, the same mapping file will work for namespaced and unnamespaced orgs, as well as orgs with the package installed managed or unmanaged. If a mapping element has no namespace prefix and adding the project’s namespace prefix is required to match a name in the org, CumulusCI will add one. Similarly, if removing a namespace is necessary, CumulusCI will do so.

In the extremely rare circumstance that an org contains the same mapped schema element in both namespaced and non-namespaced form, CumulusCI does not perform namespace injection or removal for that element.

Namespace injection can be deactivated by setting the `inject_namespaces` option to `False`.

The `generate_dataset_mapping` generates mapping files with no namespace and this is the most common pattern in CumulusCI projects.



## Namespace Handling with Multiple Mapping Files

It's also possible, and common in older managed package products, to use multiple mapping files to achieve loading the same data set in both namespaced and non-namespaced contexts. This is no longer recommended practice.

A mapping file that is converted to use explicit namespacing might look like this:

Original version:

```
Destinations:
  sf_object: Destination__c
  fields:
    Name: Name
    Target__c: Target__c
  lookups:
    Supplier__c:
      table: Supplier__c
```

Namespaced version:

```
Destinations:
  sf_object: MyNS__Destination__c
  table: Destination__c
  fields:
    MyNS__Name: Name
    MyNS__Target__c: Target__c
  lookups:
    MyNS__Supplier__c:
      key_field: Supplier__c
      table: Supplier__c
```

Note that each of the definition elements that refer to *local* storage remains un-namespaced, while those elements referring to the Salesforce schema acquire the namespace prefix.

For each lookup, an additional `key_field` declaration is required, whose value is the original storage location in local storage for that field's data. In most cases, this is simply the version of the field name in the original definition file.

Adapting an originally-namespaced definition to load into a non-namespaced org follows the same pattern, but in reverse.

Note that mappings which use the flat list style of field specification must use mapping style to convert between namespaced and non-namespaced deployment.

It's recommended that all new mappings use flat list field specifications and allow CumulusCI to manage namespace injection. This capability typically results in significant simplification in automation.

## Optional Data Elements

Some projects need to build datasets that include optional data elements - fields and objects that are loaded into some of the project's orgs, but not others. This can cover both optional managed packages and features that are included in some, but not all, orgs. For example, a managed package A that does not require another managed package B but is designed to work with it may wish to include data for managed package B in its data sets, but load that data if and only if B is installed. Likewise, a package might wish to include data supporting a particular org feature, but not load that data in an org where the feature is turned off (and its associated fields and objects are for that reason unavailable).

To support this use case, the `load_dataset` and `extract_dataset` tasks offer a `drop_missing_schema` option. When enabled, this option results in CumulusCI ignoring any mapped fields, sObjects, or lookups that correspond to

schema that is not present in the org.

Projects that require this type of conditional behavior can build their datasets in an org that contains managed package B, capture it, and then load it safely in orgs that both do and do not contain B. However, it's important to always capture from an org with B present, or B data will not be preserved in the dataset.

## 9.3 Custom Settings

Datasets don't support Custom Settings. However, a separate task is supplied to deploy Custom Settings (both list and hierarchy) into an org: `load_custom_settings`. The data for this task is defined in a YAML text file

Each top-level YAML key should be the API name of a Custom Setting. List Custom Settings should contain a nested map of names to values. Hierarchy Custom settings should contain a list, each of which contains a `data` key and a `location` key. The `location` key may contain either `profile`: `<profile name>`, `user`: `name: <username>`, `user`: `email: <email>`, or `org`.

Example:

```
List__c:
  Test:
    MyField__c: 1
  Test 2:
    MyField__c: 2
Hierarchy__c:
  -
    location: org
    data:
      MyField__c: 1
  -
    location:
      user:
        name: test@example.com
    data:
      MyField__c: 2''''
```

CumulusCI will automatically resolve the `location` specified for Hierarchy Custom Settings to a `SetupOwnerId`. Any Custom Settings existing in the target org with the specified name (List) or setup owner (Hierarchy) will be updated with the given data.

## 9.4 Dataset Tasks

### 9.4.1 create\_bulk\_data\_permission\_set

Create and assign a Permission Set that enables key features used in Bulk Data tasks (Hard Delete and Set Audit Fields) for the current user. The Permission Set will be called `CumulusCI Bulk Data`.

Note that prior to running this task you must ensure that your org is configured to allow the use of Set Audit Fields. You can do so by manually updating the required setting in the User Interface section of Salesforce Setup, or by updating your scratch org configuration to include

```
"securitySettings": {
  "enableAuditFieldsInactiveOwner": true
}
```

For more information about the Set Audit Fields feature, review [this Knowledge article](#).

After this task runs, you'll be able to run the `delete_data` task with the `hardDelete` option, and you'll be able to map audit fields like `CreatedDate`.

### 9.4.2 extract\_dataset

Extract the data for a dataset from an org and persist it to disk.

#### Options

- `mapping`: the path to the YAML definition file for this dataset.
- `sql_path`: the path to a SQL script storage location for this dataset.
- `database_url`: the URL for the database storage location for this dataset.

`mapping` and either `sql_path` or `database_url` must be supplied.

Example:

```
cci task run extract_dataset -o mapping datasets/qa/mapping.yml -o sql_path datasets/qa/
↳data.sql --org qa
```

### 9.4.3 load\_dataset

Load the data for a dataset into an org. If the storage is a database, persist new Salesforce Ids to storage.

#### Options

- `mapping`: the path to the YAML definition file for this dataset.
- `sql_path`: the path to a SQL script storage location for this dataset.
- `database_url`: the URL for the database storage location for this dataset.
- `start_step`: the name of the step to start the load with (skipping all prior steps).
- `ignore_row_errors`: If True, allow the load to continue even if individual rows fail to load. By default, the load stops if any errors occur.

`mapping` and either `sql_path` or `database_url` must be supplied.

Example:

```
cci task run load_dataset -o mapping datasets/qa/mapping.yml -o sql_path datasets/qa/
↳data.sql --org qa
```

### 9.4.4 generate\_dataset\_mapping

Inspect an org and generate a dataset definition for the schema found there.

This task is intended to streamline the process of creating a dataset definition. To use it, first build an org (scratch or persistent) containing all of the schema needed for the dataset.

Then, execute `generate_dataset_mapping`. The task inspects the target org and creates a dataset definition encompassing the project's schema, attempting to be minimal in its inclusion outside that schema. Specifically, the definition will include:

- Any custom object without a namespace
- Any custom object with the project's namespace
- Any object with a custom field matching the same namespace criteria
- Any object that's the target of a master-detail relationship, or a custom lookup relationship, from another included object.

On those sObjects, the definition will include

- Any custom field (including those defined by other packages)
- Any required field
- Any relationship field targeting another included object
- The `Id`, `FirstName`, `LastName`, and `Name` fields, if present

Certain fields will always be omitted, including

- Lookups to the User object
- Binary-blob (base64) fields
- Compound fields
- Non-createable fields

The resulting definition file is intended to be a viable starting point for a project's dataset. However, some additional editing is typically required to ensure the definition fully suits the project's use case. In particular, any fields required on standard objects that aren't automatically included must be added manually.

### Reference Cycles

Dataset definition files must execute in a sequence, one sObject after another. However, Salesforce schemas often include *reference cycles*: situations in which Object A refers to Object B, which also refers to Object A, or in which Object A refers to itself.

CumulusCI will detect these reference cycles during mapping generation and ask the user for assistance resolving them into a linear sequence of load and extract operations. In most cases, selecting the schema's most core object (often a standard object like Account) will successfully resolve reference cycles. CumulusCI will automatically tag affected relationship fields with `after` directives to ensure they're populated after their target records become available.

## Options

- `path`: Location to write the mapping file. Default: `datasets/mapping.yml`
- `ignore`: Object API names, or fields in `Object.Field` format, to ignore
- `namespace_prefix`: The namespace prefix to treat as belonging to the project, if any

Example:

```
cci task run generate_dataset_mapping --org qa -o namespace_prefix my_ns
```

### 9.4.5 load\_custom\_settings

Load custom settings stored in YAML into an org.

## Options

- `settings_path`: Location of the YAML settings file.

### 9.4.6 delete\_data

You can also delete records using CumulusCI. You can either delete every record of a particular object, certain records based on a `where` clause or every record of multiple objects. Because `where` clauses seldom make logical sense when applied to multiple objects, you cannot use a `where` clause when specifying multiple objects.

Details are available with `cci org info delete_data` and [in the task reference](#).

## Examples

```
cci task run delete_data -o objects Opportunity,Contact,Account --org qa

cci task run delete_data -o objects Opportunity -o where "StageName = 'Active' "

cci task run delete_data -o objects Account -o ignore_row_errors True

cci task run delete_data -o objects Account -o hardDelete True
```

## 9.5 Generate Fake Data

It is possible to use CumulusCI to generate arbitrary amounts of synthetic data using the [snowfakery task](#). That task is built on the [Snowfakery language](#). CumulusCI ships with Snowfakery embedded, so you do not need to install it.

To start, you will need a Snowfakery recipe. You can learn about writing them in the [Snowfakery docs](#).

Once you have it, you can fill an org with data like this:

```
$ cci task run snowfakery --recipe datasets/some_snowfakery_recipe.yml
```

If you would like to execute the recipe multiple times to generate more data, you do so like this:

```
$ cci task run generate_and_load_from_yaml --run-until-recipe-repeated 400
```

Which will repeat the recipe 400 times.

There are two other ways to control how many times the recipe is repeated: `--run-until-records-loaded` and `--run-until-records-in-org`.

### 9.5.1 Generated Record Counts

Consider this example:

```
$ cci task run snowfakery --run-until-records-loaded 1000:Account
```

This would say to run the recipe until the task has loaded 1000 new Accounts. In the process, it might also load Contacts, Opportunities, custom objects or whatever else is in the recipe. But it finishes when it has loaded 400 Accounts.

The counting works like this:

- Snowfakery always executes a *complete* recipe. It never stops halfway through. If your recipe creates more records than you need, you might overshoot. Usually the amount of overshoot is just a few records, but it depends on the details of your recipe.
- At the end of executing a recipe, it checks whether it has created enough of the object type mentioned by the `--run-until-records-loaded` parameter.
- If so, it finishes. If not, it runs the recipe again.

So if your recipe creates 10 Accounts, 5 Contacts and 15 Opportunities, then when you run the command above it will run the recipe 100 times ( $100 \times 10 = 1000$ ) which will generate 1000 Accounts, 500 Contacts and 1500 Opportunities.

`--run-until-records-in-org` works similarly, but it determines how many times to run the recipe based on how many records are in the org at the start. For example, if the org already has 300 Accounts in it then:

```
$ cci task run snowfakery --run-until-records-in-org 1000:Account
```

Would be equivalent to `--run-until-records-loaded 700:Account` because one needs to add 700 Accounts to the 300 resident ones to get to 1000.

### 9.5.2 Controlling the Loading Process

CumulusCI's data loader has many knobs and switches that you might want to adjust during your load. It supports a ".load.yml" file format which allows you to manipulate these load settings. The simplest way to use this file format is to make a file in the same directory as your recipe with a filename that is derived from the recipe's by replacing everything after the first "." with ".load.yml". For example, if your recipe is called "babka.recipe.yml" then your load file would be "babka.load.yml".

Inside of that file you put a list of declarations in the following format:

```
- sf_object: Account
  api: bulk
  bulk_mode: parallel
```

Which would specifically load accounts using the bulk API's parallel mode.

The specific keys that you can associate with an object are:

- `api`: "smart", "rest" or "bulk"
- `batch_size`: a number
- `bulk_mode`: "serial" or "parallel"
- `load_after`: the name of another subject to wait for before loading

“api”, “batch\_size” and “bulk\_mode” have the same meanings that they do in mapping.yml as described in [API Selection](#).

For example, one could force Accounts and Opportunities to load after Contacts:

```
- sf_object: Account
  load_after: Contact

- sf_object: Opportunity
  load_after: Contact
```

If you wish to share a loading file between multiple recipes, you can refer to it with the `--loading_rules` option. That will override the default filename (`<recipe_name>.load.yml`). If you want both, or any combination of multiple files, you can do that by listing them with commas between the filenames.

### 9.5.3 Batch Sizes

You can also control batch sizes with the `-o batch_size BATCHSIZE` parameter. This is not the Salesforce bulk API batch size. No matter what batch size you select, CumulusCI will properly split your data into batches for the bulk API.

You need to understand the loading process to understand why you might want to set the `batch_size`.

If you haven’t set the `batch_size` then Snowfakery generates all of the records for your load job at once.

So the first reason why you might want to set the `batch_size` is because you don’t have enough local disk space for the number of records you are generating (across all tables).

This isn’t usually a problem though.

The more common problem arises from the fact that Salesforce bulk uploads are always done in batches of records a particular SObject. So in the case above, it would upload 1000 Accounts, then 500 Contacts, then 1500 Opportunities. (remember that our scenario involves a recipe that generates 10 Accounts, 5 Contacts and 15 Opportunities).

Imagine if the numbers were more like 1M, 500K and 1.5M. And further, imagine if your network crashed after 1M Accounts and 499K Contacts were uploaded. You would not have a single “complete set” of 10/5/15. Instead you would have 1M “partial sets”.

If, by contrast, you had set your batch size to 100,000, your network might die more around the 250,000 Account mark, but you would have  $200,000/20^1 = 10K$  *complete sets* plus some “extra” Accounts which you might ignore or delete. You can restart your load with a smaller goal (800K Accounts) and finish the job.

Another reason you might choose smaller batch sizes is to minimize the risk of row locking errors when you have triggers enabled. Turning off triggers is generally preferable, and CumulusCI [has a task](#) for doing for TD TM trigger handlers, but sometimes you cannot avoid them. Using smaller batch sizes may be preferable to switching to serial mode. If every SObject in a batch uploads less than 10,000 rows then you are defacto in serial mode (because only one “bulk mode batch” at a time is being processed).

In general, bigger batch sizes achieve higher throughput. No batching at all is the fastest.

Smaller batch sizes reduce the risk of something going wrong. You may need to experiment to find the best batch size for your use case.

---

<sup>1</sup> remember that our sets have 20 Accounts each





## ACCEPTANCE TESTING WITH ROBOT FRAMEWORK

CumulusCI comes with a testing framework called [Robot Framework](#) (or just Robot), which is specifically for writing acceptance tests. These are typically end-to-end tests that verify that the high-level requirements of a project have been satisfied. (Think “Add a new student and verify they have been assigned a mentor” or “Create a case plan when the student is not enrolled in a program”.) Usually, this involves automating a browser session with Salesforce, but Robot can also be used to test new APIs created by your team.

Later sections of this document will show you how to write tests, call APIs, create custom keywords, and so on. But first there’s a bit of manual configuration to do.

### 10.1 Get Started

The test that comes with CumulusCI opens a browser and performs some automation. For that to work, you need to install [Chrome](#), and a driver for your specific version of Chrome. We don’t ship this driver by default because browser versions are continually updating, and different platforms require different drivers.

If you don’t already have Chrome on your machine, download and install it in the default location, and then download the appropriate driver from the [chromedriver download page](#). Download the latest stable version that corresponds to your Chrome version, and place it where Robot can find it. This usually means `/usr/local/bin` for Linux and OSX-based systems. (It can go anywhere as long as it’s on your PATH.)

For more information, see [Getting Started](#) on the chromedriver website.

---

#### Fun Fact

You can skip this step and still see Robot in action with CumulusCI. The tests will fail, but you can still see what it’s like to run a test, and the output that it produces.

---

#### 10.1.1 You Get a Test! And You Get a Test!

When you initialize a repository to work with CumulusCI (see [Start a new CumulusCI Project](#)), you automatically get a preconfigured robot task to run all of your Robot tests at the same time. We also install one example test, `create_contact.robot`, that shows how to write both browser-based and API-based tests. In fact, we’ve gone ahead and created a complete folder hierarchy for tests, test results, and everything else related to Robot, all starting in a folder named `robot` at the top of your repository.

```
<ProjectName>
├── robot
│   └── <ProjectName>
```

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```

├── doc
├── resources
├── tests
│   └── create_contact.robot

```

**Tip:** The `create_contact.robot` file is in plain text, so you can open it with any text editor you have on your machine. One of the features we love about Robot is that the files are not in a proprietary format.

## 10.2 Run Your First Test

You can run all tests for a project with a simple command line. In case you don't have a default org defined, we'll include instructions on which scratch org to use.

```
$ cci task run robot --org dev
```

If all goes well, the browser pops up, navigates around a bit, and then closes. The output on your screen looks something like this, though you might see additional information about creating the scratch org.

```

$ cci task run robot --org dev
2021-08-04 16:28:32: Getting org info from Salesforce CLI for test-yeqqkbxks2ny@example.
→COM
2021-08-04 16:28:35: Beginning task: Robot
2021-08-04 16:28:35: As user: test-yeqqkbxks2ny@example.com
2021-08-04 16:28:35: In org: 00D0R0000000Tz56
2021-08-04 16:28:35:
=====
Tests
=====
Tests.Create Contact
=====
Via API | PASS |
-----
Via UI | PASS |
-----
Tests.Create Contact | PASS |
2 tests, 2 passed, 0 failed
=====
Tests | PASS |
2 tests, 2 passed, 0 failed
=====
Output: /projects/<ProjectName>/robot/<ProjectName>/results/output.xml
Log: /projects/<ProjectName>/robot/<ProjectName>/results/log.html
Report: /projects/<ProjectName>/robot/<ProjectName>/results/report.html

```

Notice the three lines at the end that point to an XML file and two HTML files. These paths will be different on your machine and reflect the path to your repository. All Robot results go into the `robot/<ProjectName>/results` folder. These files are overwritten each time you run your Robot tests.

Robot places all of the test results in `output.xml`, and then generates `log.html` and `report.html`, which contain

two different human-readable views of the results. `log.html` is more developer-friendly and contains debugging information. `report.html` is a high-level report of successes and failures.

## 10.2.1 View Log and Report Files

You can open these files in a browser with the `open` command.

```
$ open robot/<ProjectName>/results/log.html
```

**Create Contact Log** Generated  
20210826 11:15:59 UTC-05:00  
41 seconds ago **REPORT**

**Test Statistics**

Total Statistics	Total	Pass	Fail	Skip	Elapsed	Pass / Fail / Skip
All Tests	2	2	0	0	00:00:22	<div></div>

Statistics by Tag	Total	Pass	Fail	Skip	Elapsed	Pass / Fail / Skip
No Tags						<div></div>

Statistics by Suite	Total	Pass	Fail	Skip	Elapsed	Pass / Fail / Skip
Create Contact	2	2	0	0	00:00:31	<div></div>

**Test Execution Log**

- SUITE** Create Contact 00:00:31.301
  - Full Name: Create Contact
  - Source: [/projects/ProjectName/robot/ProjectName/tests/create\\_contact.robot](/projects/ProjectName/robot/ProjectName/tests/create_contact.robot)
  - Start / End / Elapsed: 20210826 11:15:28.573 / 20210826 11:15:59.874 / 00:00:31.301
  - Status: 2 tests total, 2 passed, 0 failed, 0 skipped
  - SETUP** Salesforce . Open Test Browser 00:00:06.762
  - TEARDOWN** Salesforce . Delete Records and Close Browser 00:00:01.980
  - TEST** Via API 00:00:03.851
  - TEST** Via UI 00:00:18.384

Feel free to open `output.xml` or `report.html` if you're curious. In our experience, `log.html` is the most useful for humans, and it's the one we use when reporting test results.

Want to learn more? The next section goes into more detail about why we love Robot Framework, and how you can write your own tests.

## 10.3 So Why Robot?

Robot is a [keyword-driven](#) acceptance testing framework, which means that users can write test cases in an intuitive, human-readable language made up of high-level, reusable keywords (`Open test browser`, `Delete records` and `close browser`) rather than in a programming language.

For example, this basic Robot test case file creates a new `Contact` record, and then examines the record to confirm that the fields listed are correct. You can see how straightforward the keyword syntax is. Even someone brand new to test automation can grasp the function of the `Salesforce Insert`, `Salesforce Get`, and `Should be equal` keywords.

```
*** Settings ***
Resource      cumulusci/robotframework/Salesforce.robot
Documentation  A simple Robot test

*** Test Cases ***
Create a Contact using the API

    # Create a new Contact
    ${contact id}=    Salesforce Insert    Contact
    ...    FirstName=Eleanor
    ...    LastName=Rigby

    # Get the new Contact and examine it
    &{contact}=        Salesforce Get    Contact    ${contact id}
    Should be equal    ${contact}[FirstName]    Eleanor
    Should be equal    ${contact}[LastName]     Rigby
```

## 10.4 The Robot Framework Advantage

Acceptance testing touches on multiple aspects of an application such as the data model, custom APIs, performance, and the user experience in the browser. Existing tools like Apex and Jest are good for writing unit tests and low-level integration tests. However, it can be difficult to understand the intent of a test, and the features being tested, when the test itself involves multiple lines of code detailing where to fetch data from, and how, and other such implementation details.

Robot addresses these challenges with a few strategies, helping you write high-level acceptance tests for every aspect of an application, often in a single test suite.

- **Human-readable, domain-specific test cases:** Robot lets you create a language tailored to the domain of testing Salesforce applications (a domain-specific language, or DSL). The DSL consists of reusable keywords that present a complex set of instructions in a human-readable language. The result? Test cases that all project stakeholders can easily understand, such as a product manager, scrum master, documentation teams, and so on—not just the test authors. In the previous example, `Salesforce Insert`, `Salesforce Get` and `Should be equal` are all keywords.
- **Keyword libraries:** Robot organizes keywords into libraries, which provide a simple, effective method to organize and share keywords between tests and projects. CumulusCI comes with a comprehensive standard library of Robot keywords created specifically to anticipate the needs of Salesforce testers. In the previous example, when you define `Salesforce.robot` as a resource, it automatically pulls in dozens of Salesforce-specific keywords.
- **Streamlined test cases:** Keywords allow implementation details to be handled by the test but not explicitly itemized in the test. In the previous example, a new `Contact` record is created with the `Salesforce Insert` keyword, but we don't see all the steps required to make an API call to create the record, such as getting an

access token, creating an API payload, making the API call, and parsing the results. We see only two keywords that communicate with Salesforce via an API: one to create the `Contact` record, and another to retrieve the new record to confirm it has the correct first and last names.

### 10.4.1 Robot-specific Tasks

CumulusCI integrates with Robot via custom tasks, such as:

- `robot`: Runs one or more Robot tests. This task is the most common.
- `robot_libdoc`: Runs the `libdoc` command, which creates an HTML file defining all the keywords in a library or resource file.
- `robot_testdoc`: Runs the `testdoc` command, which creates an HTML file documenting all the tests in a test suite.
- `robot_lint`: Runs the static analysis tool `rflint`, which can validate Robot tests against a set of rules related to code quality.

Like with any CumulusCI task, you can get documentation and a list of arguments with the `cci task info` command. For example, `cci task info robot` displays documentation for the `robot` task.

### 10.4.2 Custom Keywords

CumulusCI provides a set of keywords unique to both Salesforce and CumulusCI for acceptance testing. These keywords can run other tasks, interact with Salesforce applications, call Salesforce APIs, and so on. For a list of all custom keywords provided by CumulusCI, see [Keywords.html](#).

**Tip:** In addition to the keywords that come with CumulusCI, you can write project-specific keywords that are either based on existing keywords, or implemented in Python.

## 10.5 Write a Sample Robot Test Case

Now that you have a general understanding of why Robot is ideal for acceptance testing with CumulusCI, let's construct a test case file that creates a new `Contact` record.

1. Run `cci project init`, which creates the `create_contact.robot` test case file that comes standard whenever you initialize a project with CumulusCI.
2. In the `robot/<ProjectName>/tests` folder, save this code in a new file named `new_contact_record.robot`.

```
*** Settings ***
Resource      cumulusci/robotframework/Salesforce.robot
Documentation  A simple Robot test

*** Test Cases ***
Create a Contact using the API

    # Create a new Contact
    ${contact id}=    Salesforce Insert    Contact
    ...    FirstName=Eleanor
```

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```

...   LastName=Rigby

# Get the new Contact and examine it
&{contact}=      Salesforce Get   Contact   ${contact id}
Should be equal  ${contact}[FirstName]  Eleanor
Should be equal  ${contact}[LastName]   Rigby

```

You can tell that both `create_contact.robot` and `new_contact_record.robot` are test case files because each one has a `.robot` extension and contains a `Test Cases` section. The `new_contact_record.robot` test case file is a simplified version of `create_contact.robot`. We feature it in this documentation for simpler code samples.

### 10.5.1 Syntax

Here's a quick primer on the syntax in the `new_contact_record.robot` test case file.

Symbol	Name	Description and Usage
***	Section Heading	A line that begins with one or more asterisks is a section heading. By convention, we use three asterisks on both sides of a heading to designate a section heading. Section headings include <code>Settings</code> , <code>Test Cases</code> , <code>Keywords</code> , <code>Variables</code> , <code>Comments</code> , and <code>Tasks</code> .
#	Hash	Designates code comments.
\${ }	Variable	Curly braces surrounding a name designate a variable. The lead <code>\$</code> character refers to a single value. Variable names are case-insensitive. Spaces and underscores are allowed and are treated the same.
&{ }	Dictionary or Map	A lead <code>&amp;</code> character refers to a variable that contains a dictionary or map for key-value pairs, such as <code>&amp;{contact}</code> , which in this test has defined values for the keys <code>FirstName</code> and <code>LastName</code> .
=	Assignment	Equals sign is optional yet convenient for showing that a variable is assigned a value. Before the equals sign, up to one space is allowed but <i>not</i> required. After the equals sign, two spaces are required, but more are allowed to format test cases into readable columns.
...	Ellipses	Ellipses designate the continuation of a single-line row of code split over multiple lines for easier readability.
	Space	Two or more spaces separate arguments from the keywords, and arguments from each other. Multiple spaces can be used to align data and to aid in readability.

For more details on Robot syntax, visit the official [Robot syntax documentation](#).

### 10.5.2 Settings

The `Settings` section of the `.robot` file sets up the entire test suite. Configurations established under `Settings` affect all test cases, such as:

- `Suite Setup` and `Suite Teardown`, which support processes before the test begins and cleanup after the test finishes.
- `Documentation`, which describes the purpose of the test suite.
- `Tags`, which lets a user associate individual test cases with a label.
- `Resource`, which imports keywords from external files.

For example, these are the settings stored in the `new_contact_record.robot` file.

```
*** Settings ***
Resource      cumulusci/robotframework/Salesforce.robot
Documentation  A simple Robot test
```

The `cumulusci/robotframework/Salesforce.robot` resource file comes with CumulusCI and automatically inherits useful configuration and keywords for Salesforce testing. The `Salesforce.robot` resource file is the primary method of importing all keywords and variables provided by CumulusCI, so it's best practice for the file to be the first item imported as a Resource under Settings. It also imports the [CumulusCI Library](#), the [Salesforce Library](#), the third-party [SeleniumLibrary](#) for browser testing via Selenium, and these most commonly used Robot libraries.

- [Collections](#)
- [OperatingSystem](#)
- [String](#)
- [XML](#)

CumulusCI also comes bundled with these third-party keyword libraries, which must be explicitly imported by any test suite that needs them.

- [RequestsLibrary](#) for testing REST APIs. To use [RequestsLibrary](#), explicitly import it under the Settings section of your Robot test.
- All other libraries listed in the Standard tab of the [Robot libraries documentation](#).

### 10.5.3 Test Cases

In the Test Cases section of the `.robot` file, each test case gets its own code block; the test case name is the first line of code, with no indentation. The body of the test case is all the indented text underneath.

For example, here is the Test Cases section of the `new_contact_record.robot` test case file. It has a single test case named `Create a Contact using the API`.

```
*** Test Cases ***
Create a Contact using the API

    # Create a new Contact
    ${contact id}=    Salesforce Insert    Contact
    ...    FirstName=Eleanor
    ...    LastName=Rigby

    # Get the new Contact and examine it
    &{contact}=    Salesforce Get    Contact    ${contact id}
    Should be equal    ${contact}[FirstName]    Eleanor
    Should be equal    ${contact}[LastName]    Rigby
```

Notice these keywords used in the test case.

- `Salesforce Insert` creates a new `Contact` record with the arguments it's given for the `FirstName` and `LastName` fields.
- `Salesforce Get` retrieves the requested `Contact` record based on its ID.
- `Should Be Equal` compares the arguments to the values of the `FirstName` and `LastName` fields of the newly created `Contact` record.

---

**Tip:** Keywords in the test cases are separated from arguments by two or more spaces.

---

## 10.6 Suite Setup and Teardown

Most real-world tests require setup before the test begins (such as opening a browser or creating test data), and cleanup after the test finishes (such as closing the browser or deleting test data). Robot supports setup and teardown at both the suite level (such as opening the browser before the first test, *and* closing the browser after the last test) and the test level (such as opening and closing the browser at the start *and* the end of the test).

If you run the `new_contact_record.robot` test case file several times, you add a new `Contact` record to your scratch org each time it runs. If you have a test that requires a specific number of `Contact` records, the test can fail the second time you run it. To maintain the required record count, you can add a teardown that deletes any `Contact` records created by running the test.

Let's modify the `new_contact_record.robot` test case file with a Suite Teardown that deletes the `Contact` records created by any tests in the suite.

```
*** Settings ***
Resource      cumulusci/robotframework/Salesforce.robot
Documentation  A simple Robot test
Suite Teardown Delete session records

*** Test Cases ***
Create a Contact using the API

    # Create a new Contact
    ${contact id}=    Salesforce Insert    Contact
    ...    FirstName=Eleanor
    ...    LastName=Rigby

    # Get the new Contact and examine it
    &{contact}=        Salesforce Get    Contact    ${contact id}
    Should be equal    ${contact}[FirstName]    Eleanor
    Should be equal    ${contact}[LastName]     Rigby
```

---

**Note:** The `Salesforce Insert` keyword keeps track of the record IDs created. The `Delete session records` keyword deletes those records.

---

To run this test from the command line:

```
$ cci task run robot --suites robot/<ProjectName>/tests/new_contact_record.robot
```



## 10.7 Generate Fake Data with Faker

The `get fake data` keyword comes with the Faker library that's installed with CumulusCI, and saves you from hard-coding test data for Robot tests. `Get fake data` does much more than just return random strings; it generates strings in an appropriate format. You can ask it for a name, address, date, phone number, credit card number, and so on, and get back properly formatted data.

For example, let's modify the `new_contact_record.robot` test case file to generate a fake name. Because the new Contact name is randomly generated in this updated example, you can't hard-code an assertion on the name of the created Contact to verify the name. Instead, for illustrative purposes, this test logs the Contact name in the test's `log.html` file.

```
*** Settings ***
Resource      cumulusci/robotframework/Salesforce.robot
Documentation  A simple Robot test
Suite Teardown Delete session records

*** Test Cases ***
Create a Contact with a generated name
    [Teardown]    Delete session records

    # Generate a name to use for Contact
    ${first name}=  Get fake data  first_name
    ${last name}=   Get fake data  last_name

    # Create a new Contact
    ${contact id}=  Salesforce Insert  Contact
    ...  FirstName=${first name}
    ...  LastName=${last name}

    # Get the new Contact and add name to the log
    &{contact}=     Salesforce Get  Contact  ${contact id}
    Log  Contact name: ${contact}[Name]
```

To run this test from the command line:

```
$ cci task run robot --suites robot/<ProjectName>/tests/new_contact_record.robot
```

## 10.8 Create Custom Keywords

We mentioned earlier that Robot makes use of a domain-specific language. By creating a collection of reusable custom keywords, we can create this DSL for testing Salesforce apps.

Let's create a new Robot test that includes a custom keyword called `Create a test Contact`, which creates a Contact record and then saves the data for this record in a test variable. Save this code in a file named `custom_keyword.robot` in the `tests` folder of your project's repository.

```
*** Settings ***
Resource      cumulusci/robotframework/Salesforce.robot
Suite Teardown Delete session records

*** Test Cases ***
```

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**Example of using a custom keyword in a setup step**

```
[Setup]      Create a test Contact

# Get the new Contact that's stored in a test variable,
# and add the name to the log
Log  New Contact: ${new contact}[Name]

*** Keywords ***
Create a test Contact
[Documentation]  Create a temporary Contact and return it

# Generate a name to use for Contact
${first name}=  Get fake data  first_name
${last name}=   Get fake data  last_name

# Create a new Contact
${contact id}=  Salesforce Insert  Contact
...  FirstName=${first name}
...  LastName=${last name}

# Fetch the Contact object to be returned and save
# it to a test variable
&{new contact}=  Salesforce Get      Contact      ${contact_id}
Set test variable  &{new contact}
```

Because the Contact record was created inside the Create a test Contact keyword, the `&{new contact}` variable is not going to be visible to any test case or keyword that calls the Create a test Contact keyword. It's only when we use the built-in keyword `Set test variable` that the newly created `&{new contact}` variable becomes visible in the Example of using a custom keyword in a setup step test case.

Each test case and keyword can have its own settings. However, instead of a Settings section inside of a test case or keyword, test case or keyword settings are specified with the setting name in square brackets. In the previous example:

- `[Setup]` is a setting for the Example of using a custom keyword in a setup step test case.
- `[Documentation]` is a setting for the Create a test Contact keyword.

For details, see the [Settings in the Test Case](#) section in the official Robot Framework documentation.

To run this test from the command line:

```
$ cci task run robot --suites robot/<ProjectName>/tests/custom_keyword.robot
```

## 10.9 Create a Resource File

Now that you know how to create a reusable custom keyword in a test case file, you can build a library of custom keywords to be shared project-wide with a resource file.

A resource file is similar to a test case file, except it can't contain test cases. Typically, a resource file stores settings that are used by every test in the project, such as defining project-specific variables, or importing project-specific keyword libraries and resource files.

Let's create a resource file that stores the Create a test Contact custom keyword, which is currently in the `custom_keyword.robot` test case file defined in [Create Custom Keywords](#). There aren't any requirements for nam-

ing resource files. However, most teams have standardized creating a resource file named after the project, such as NPSP.robot for NPSP.

For this example, we'll stick to this convention and create a file named after your project. Save this code in a file named robot/<ProjectName>/resources/<ProjectName>.robot.

```
*** Settings ***
Resource      cumulusci/robotframework/Salesforce.robot

Create a test Contact
    [Documentation]  Create a temporary Contact and return it

    # Generate a name to use for Contact
    ${first name}=  Get fake data  first_name
    ${last name}=   Get fake data  last_name

    # Create a new Contact
    ${contact id}=  Salesforce Insert  Contact
    ...  FirstName=${first name}
    ...  LastName=${last name}

    # Fetch the Contact object to be returned and save
    # it to a test variable
    &{new contact}=  Salesforce Get  Contact  ${contact_id}
    Set test variable  &{new contact}
```

**Note:** Along with moving the Keywords section in the custom\_keyword.robot test case file to this file, you must also import Salesforce.robot as a Resource because that's where the Faker library is defined.

Next, let's modify the custom\_keyword.robot test case file. Remove the Keywords section, and then under Settings, add as many Resource statements as needed to import keywords from their specific .robot resource files.

```
*** Settings ***
Resource      cumulusci/robotframework/Salesforce.robot
Resource      <ProjectName>/resources/<ProjectName>.robot

Suite Teardown  Delete session records

*** Test Cases ***
Example of using a custom keyword in a setup step
    [Setup]      Create a test Contact

    # Get the new Contact that's stored in a test variable,
    # and add the name to the log
    Log  New Contact: ${new contact}[Name]
```

**Note:** Keywords defined in resource files are accessible to all tests in a suite that imports the resource files.

## 10.10 Create a Simple Browser Test

Now that you know how to create records using the API, you can use those records in a browser test.

Let's create a Robot test that uses Suite Setup to call the Open test browser keyword. Save this code in a file named `ui.robot` in the `tests` folder of your project's repository.

```
*** Settings ***
Resource          cumulusci/robotframework/Salesforce.robot

Suite Setup       Open test browser
Suite Teardown    Delete records and close browser

*** Test Cases ***
Take screenshot of landing page
    Wait until page contains    Most Recently Used
    Capture page screenshot
```

Because this test case file calls `Open test browser`, a browser window appears while the test runs. The test case takes a screenshot, which can be a useful tool when debugging tests (a tool used sparingly because screenshots can take up a lot of disk space). Suite Teardown then calls the `Delete records and close browser` keyword to complete the test.

---

**Note:** `Open test browser` doesn't always wait long enough for Salesforce to render. That's why the `Wait until page contains` keyword comes in handy. It waits until the "Most Recently Used" section of the web page appears, which is a good indication that the site has loaded.

---

To run this test from the command line:

```
$ cci task run robot --suites robot/<ProjectName>/tests/ui.robot
```

In addition to the usual output files (`log.html`, `report.html`, `output.xml`), this test also creates a screenshot in the `results` folder. If you open `log.html`, you can see whether each step of the test case passed or failed. Toggle the + tab of the `Take screenshot of landing page` test header to examine the results of the test. Then toggle the + tab of the `Capture page screenshot` keyword to examine the screenshot taken of the landing page.

**Ui Log** Generated 20210826 11:12:53 UTC-05:00  
1 minute 22 seconds ago **REPORT**

**Test Statistics**

Total Statistics	Total	Pass	Fail	Skip	Elapsed	Pass / Fail / Skip
All Tests	1	1	0	0	00:00:02	<div style="width: 100%;"></div>

Statistics by Tag	Total	Pass	Fail	Skip	Elapsed	Pass / Fail / Skip
No Tags						

Statistics by Suite	Total	Pass	Fail	Skip	Elapsed	Pass / Fail / Skip
UI	1	1	0	0	00:00:14	<div style="width: 100%;"></div>

**Test Execution Log**

- SUITE** Ui 00:00:14.444
  - Full Name:** Ui
  - Source:** /projects/ProjectName/robot/ProjectName/tests/ui.robot
  - Start / End / Elapsed:** 20210826 11:12:39.088 / 20210826 11:12:53.532 / 00:00:14.444
  - Status:** 1 test total, 1 passed, 0 failed, 0 skipped
  - SETUP** Salesforce . Open Test Browser 00:00:12.323
  - TEARDOWN** Salesforce . Delete Records and Close Browser 00:00:00.093
  - TEST** Take screenshot of landing page 00:00:01.621
    - Full Name:** Ui.Take screenshot of landing page
    - Start / End / Elapsed:** 20210826 11:12:51.816 / 20210826 11:12:53.437 / 00:00:01.621
    - Status:** **PASS**
    - KEYWORD** SeleniumLibrary . Wait Until Page Contains Most Recently Used 00:00:01.382
    - KEYWORD** SeleniumLibrary . Capture Page Screenshot 00:00:00.199
      - Documentation:** Takes a screenshot of the current page and embeds it into a log file.
      - Start / End / Elapsed:** 20210826 11:12:53.219 / 20210826 11:12:53.418 / 00:00:00.199

8 **INFO**

### 10.10.1 Open the Browser

The Selenium library comes with a keyword for opening the browser. However, CumulusCI comes with its own keyword, `Open Test Browser`, which not only opens the browser but also takes care of the details of logging into the org. This keyword uses a variable named `${BROWSER}`, which can be set from the command line or in the `cumulusci.yml` file to specify which browser to use.

Specify variables in the `cumulusci.yml` file or in the `vars` option under `robot` in the `tasks` section. For example, `${BROWSER}` defaults to `chrome` in Robot, but it can be set to `firefox`.

```
tasks:
  robot:
    options:
      vars:
        - BROWSER:firefox
```

To set the browser to `firefox` from the command line *for a single test run*:

```
$ cci task run robot --vars BROWSER:firefox
```

### 10.10.2 Supported Browsers

The `robot` task supports both Chrome and Firefox browsers, and the headless variations of these browsers, `headlesschrome` and `headlessfirefox`. With the headless version, browser tests run without opening a browser window. The tests still use a browser, but you can't see it while the test runs. This variation is most useful when you run a test on a continuous integration server like MetaCI, where a physical display isn't connected to the server.

To specify the headless version of a browser, prepend `headless` to the browser name. For example, the command line option to specify headless Chrome is `--var BROWSER:headlesschrome`.

---

**Tip:** When you run a test in headless mode, you can still capture screenshots of the browser window. The `Capture Page Screenshot` keyword is indispensable for debugging tests that failed in headless mode.

---

## 10.11 Combine API Keywords and Browser Tests

In Robot, API and browser keywords can be used together to build more elaborate acceptance tests.

Let's build on the original `new_contact_record.robot` test to integrate the previous configurations covered so far. Replace the entirety of the `new_contact_record.robot` test case file in the `tests` folder of your project's repository with this code.

```
*** Settings ***
Resource      cumulusci/robotframework/Salesforce.robot
Documentation  A simple Robot test

Suite Setup   Open test browser
Suite Teardown Delete records and close browser

*** Test Cases ***
Take screenshot of list of Contacts
  [Setup]     Create a test Contact
```

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```

Go to object home  Contact
Capture page screenshot

*** Keywords ***
Create a test Contact
    [Documentation]  Create a temporary Contact and return the ID
    [Return]         ${contact id}

    # Generate a name to use for Contact
    ${first name}=   Get fake data  first_name
    ${last name}=    Get fake data  last_name

    # Create a new Contact
    ${contact id}=   Salesforce Insert  Contact
    ...  FirstName=${first name}
    ...  LastName=${last name}

```

The `new_contact_record.robot` test case file not only creates a `Contact` record, it also opens the browser to see that the `Contact` record appears in a list of `Contacts`, takes a screenshot of the list, then deletes all new records created during the test run, and closes the browser.

To run this test from the command line:

```
$ cci task run robot --suites robot/<ProjectName>/tests/new_contact_record.robot
```

## 10.12 Run an Entire Test Suite

At this point, the `robot` folder in your project repository should look like this.

```

<ProjectName>
├── robot
│   └── <ProjectName>
│       ├── doc
│       ├── resources
│       │   └── <ProjectName>.robot
│       ├── results
│       │   ├── log.html
│       │   ├── output.xml
│       │   ├── report.html
│       │   ├── selenium-screenshot-1.png
│       │   └── selenium-screenshot-2.png
│       └── tests
│           ├── create_contact.robot
│           ├── custom_keyword.robot
│           ├── new_contact_record.robot
│           └── ui.robot

```

While a single `.robot` file is considered to be a test suite, Robot also considers folders to be suites. You can pass a folder to Robot to run all tests stored in that folder. So if you've saved the `new_contact_record.robot`, `custom_keyword.robot`, and `ui.robot` test case files in the `tests` folder, you can run all of the tests in the command line.

```
$ cci task run robot --suites robot/<ProjectName>/tests
```

In the output, you can see that all of the test case files in the `tests` folder have been run, including the `create_contact.robot` test case file that comes with CumulusCI.

```
$ cci task run robot --suites robot/<ProjectName>/tests
2021-08-24 16:45:36: Getting org info from Salesforce CLI for test-4g5sxdzt9sj3@example.
  ↪ com
2021-08-24 16:45:39: Beginning task: Robot
2021-08-24 16:45:39: As user: test-4g5sxdzt9sj3@example.com
2021-08-24 16:45:39: In org: 00D560000000KC1g
2021-08-24 16:45:39:

=====
Tests
=====
Tests.Create Contact
=====
Via API | PASS |
-----
Via UI | PASS |
-----
Tests.Create Contact | PASS |
2 tests, 2 passed, 0 failed
=====
Tests.Custom Keyword
=====
Example of using a custom keyword in a setup step | PASS |
-----
Tests.Custom Keyword | PASS |
1 test, 1 passed, 0 failed
=====
Tests.New Contact Record :: A simple Robot test
=====
Take screenshot of list of Contacts | PASS |
-----
Tests.New Contact Record :: A simple Robot test | PASS |
1 test, 1 passed, 0 failed
=====
Tests.Ui :: A simple Robot test
=====
Take screenshot of list of Contacts | PASS |
-----
Tests.Ui :: A simple Robot test | PASS |
1 test, 1 passed, 0 failed
=====
Tests | PASS |
5 tests, 5 passed, 0 failed
=====
Output: /projects/<ProjectName>/robot/<ProjectName>/results/output.xml
Log: /projects/<ProjectName>/robot/<ProjectName>/results/log.html
Report: /projects/<ProjectName>/robot/<ProjectName>/results/report.html
```

**Tip:** Test suite folders can also contain nested folders of tests, which makes it easy to organize tests into functional



groups. For example, you can store all API tests in a `tests/api` folder, and store all UI tests in a `tests/ui` folder.

Because running everything in the `tests` folder is such common practice, it's the default behavior for the `robot` task.

To run an entire suite of tests with the `robot` task:

```
$ cci task run robot
```

## 10.13 Learn More About Robot Framework

To learn more about Robot, visit the [Robot Framework User Guide](#). We also have these resources in the CumulusCI documentation.

### 10.13.1 Robot Advanced Topics

In the previous section we gave a broad overview of how Robot Framework is integrated with CumulusCI. In this section we'll take a deeper dive into some advanced topics.

#### Running CumulusCI Tasks

CumulusCI provides two keywords for running a task from within a robot test case: [Run Task](#) and [Run Task Class](#).

[Run Task](#) can be used to run any CumulusCI tasks configured for the project. Tasks run can be any of CumulusCI's standard tasks as well as project-specific custom tasks from the project's `cumulusci.yml` file. [Run Task](#) accepts a single argument, the task name, along with any arguments required by the task.

[Run Task Class](#) works in a similar fashion, but the task can be specified as a python class rather than a task name. For example, you can use this keyword to run logic from CumulusCI tasks which have not been configured in the project's `cumulusci.yml` file. This is most useful in cases where a test needs to use task logic for logic unique to the test and thus not worth making into a named task for the project.

#### Performance Testing

The Salesforce keyword library comes with several keywords to aid in performance testing.

#### Setting the elapsed time

Normally, the full execution time of a test is recorded in the robot framework log. This includes the time spent in both test setup and teardown. Sometimes it is preferable to report only the time spent in the test case itself.

The [Set Test Elapsed Time](#) keyword allows you to record a computed elapsed time. For example, when performance testing a Salesforce batch process, you have the option to store the Salesforce-measured elapsed time of the batch process instead of the time measured in the CumulusCI client process.

The [Set Test Elapsed Time](#) keyword takes a single optional argument, either a number of seconds or a [Robot time string](#).

When using this keyword, the tag `cci_metric_elapsed_time` will automatically be added to the test case.

When the test is run via MetaCI, the computed time will be retrieved and stored inside MetaCI instead of the total elapsed time as measured by Robot Framework.

## Start and End Performance Time

A time can be recorded for any group of keywords by calling Start Performance Timer and Stop Performance Timer. The latter will automatically call the [Set Test Elapsed Time](#) keyword.

The [Start Performance Timer](#) keyword starts a timer. The [Stop Performance Timer](#) keyword stops the timer and stores the result with [Set Test Elapsed Time](#).

## Setting Test Metrics

The [Set Test Metric](#) keyword retrieves any metric for performance monitoring, such as number of queries, rows processed, CPU usage, and more.

The keyword takes a metric name, which can be any string, and a value, which can be any number.

Using this keyword will automatically add the tag `cci_metric` to the test case and `${cci_metric_<metric_name>}` to the test's variables. These permit downstream processing in tools like CCI and MetaCI.

Note: `cci_metric` is not included in Robot's html statistical roll-ups.

Set Test Metric	Max_CPU_Percent	30
-----------------	-----------------	----

Performance test metrics are output in the CCI logs, `log.html` and `output.xml`. MetaCI captures them but does not currently have a user interface for displaying them.

## Elapsed Time for Last Record

The [Elapsed Time For Last Record](#) keyword queries Salesforce for its recorded log of a job.

For example, to query an Apex bulk job:

<pre> \${time_in_seconds} =    Elapsed Time For Last Record ...                    obj_name=AsyncApexJob ...                    where=ApexClass.Name='BlahBlah' ...                    start_field=CreatedDate ...                    end_field=CompletedDate ...                    order_by=CompletedDate </pre>
--

## Browser Testing

Testing salesforce from within a browser presents some unique challenges. This section covers some Salesforce-specific features of our keyword libraries.

## Waiting for Lightning UI

A common challenge when writing end-to-end UI tests is waiting for asynchronous actions to complete before proceeding to run the next interaction. The Salesforce Library is aware of the Lightning UI and can handle waiting automatically. After each click, the Salesforce Library waits for any pending requests to the server to complete. (Manually waiting using “sleep”, or waiting for a particular element to appear, can still be necessary after specific interactions, and when interacting with pages that don’t use the Lightning UI.)

## API Keywords

In addition to browser interactions, the Salesforce Library also provides keywords for interacting with the Salesforce REST API. Here are the keywords we provide which talk directly to Salesforce via an API rather than through the UI:

- **Salesforce Collection Insert:** Creates a collection of objects based on a template.
- **Salesforce Collection Update:** Updates a collection of objects.
- **Salesforce Delete:** Deletes a record using its type and ID.
- **Salesforce Get:** Gets a dictionary of a record from its ID.
- **Salesforce Insert:** Inserts a record using its type and field values. Returns the ID.
- **Salesforce Query:** Runs a simple query using the `object type` and `<field_name=value>` syntax. Returns a list of matching record dictionaries.
- **Salesforce Update:** Updates a record using its type, ID, and `<field_name=value>` syntax.
- **SOQL Query:** Runs a SOQL query and returns a REST API result dictionary.

## Using PageObjects

The `PageObjects` library provides support for page objects, Robot Framework-style. Even though Robot is a keyword-driven framework, it’s also possible to dynamically load in keywords unique to a page or an object on the page.

With the `PageObjects` library, you can define classes that represent page objects. Each class provides keywords that are unique to a page or a component. These classes can be imported on demand only for tests that use these pages or components.

## The `pageobject` Decorator

Page objects are normal Python classes that use the `pageobject` decorator provided by CumulusCI. Unlike traditional Robot Framework keyword libraries, you can define multiple sets of keywords in a single file.

To create a page object class, start by inheriting from one of the provided base classes. No matter which class you inherit from, your page object class gets these predefined properties.

- `self.object_name`: The name of the object related to the class. This is defined via the `object_name` parameter to the `pageobject` decorator. Do not add the namespace prefix in the decorator. This attribute will automatically add the prefix from the `cumulusci.yml` file when necessary.
- `self.builtin`: A reference to the Robot Framework `BuiltIn` library that can be used to directly call built-in keywords. Any built-in keyword can be called by converting the name to all lowercase, and replacing all spaces with underscores (such as `self.builtin.log` and `self.builtin.get_variable_value`).
- `self.cumulusci`: A reference to the CumulusCI keyword library. Call any keyword in this library by converting the name to all lowercase, and replacing all spaces with underscores (such as `self.cumulusci.get_org_info`).

- `self.salesforce`: A reference to the Salesforce keyword library. Call any keyword in this library by converting the name to all lowercase, and replacing all spaces with underscores (such as `self.salesforce.wait_until_loading_is_complete`).
- `self.selenium`: A reference to SeleniumLibrary. Call any keyword in this library by converting the name to all lowercase, and replacing all spaces with underscores (such as `self.selenium.wait_until_page_contains_element`).

## Page Object Base Classes

Presently, CumulusCI provides the following base classes, which should be used for all classes that use the `pageobject` decorator:

- `cumulusci.robotframework.pageobjects.BasePage` A generic base class used by the other base classes. Use the `BasePage` class as a base class for your page object classes.
  - The `BasePage` adds the `Log current page object` keyword to every page object. This keyword is most useful when debugging tests. It will add to the log information about the currently loaded page object.
- `cumulusci.robotframework.pageobjects.DetailPage`: A class for a page object that represents a detail page.
- `cumulusci.robotframework.pageobjects.HomePage`: A class for a page object that represents a home page.
- `cumulusci.robotframework.pageobjects.ListingPage`: A class for a page object that represents a listing page.
- `cumulusci.robotframework.pageobject.NewModal`: A class for a page object that represents the “new object” modal.
- `cumulusci.robotframework.pageobject.ObjectManagerPage`: A class for interacting with the object manager.

## Example Page Object

This example shows the definition of a page object for the listing page of custom object `MyObject__c` wherein a new custom keyword, `Click on the row with name`, is added.

```
from cumulusci.robotframework.pageobjects import pageobject, ListingPage

@pageobject(page_type="Listing", object_name="MyObject__c")
class MyObjectListingPage(ListingPage):

    def click_on_the_row_with_name(self, name):
        self.selenium.click_link('xpath://a[@title="{0}"]'.format(name))
        self.salesforce.wait_until_loading_is_complete()
```

The `pageobject` decorator takes two arguments: `page_type` and `object_name`. These two arguments are used to identify the page object (`Go to page Listing Contact`). The values can be any arbitrary string, but ordinarily should represent standard page types (such as “Detail”, “Home”, “Listing”, or “New”) and standard object names.

## Importing the Page Object Library Into a Test

The `PageObjects` library is not only a keyword library, but also the mechanism to import files that contain page object classes. You can import these files by providing the paths to one or more Python files that implement page objects. You can also import `PageObjects` without passing any files to it to take advantage of general purpose page objects.

For example, consider a case where you create two files that each have one or more page object definitions: `PageObjects.py` and `MorePageObjects.py`, both located in the `robot/MyProject/resources` folder. You can import these page objects from these files into a test suite.

```
*** Settings ***
Library          cumulusci.robotframework.PageObjects
...    robot/MyProject/resources/PageObjects.py
...    robot/MyProject/resources/MorePageObjects.py
```

## Using Page Objects

To use the keywords in a page object:

As mentioned in the previous section, first import the `PageObjects` library and any custom page object files you wish to use.

Next, either explicitly load the keywords for a page object, or reference a page object with one of the generic *page object keywords* provided by the `PageObjects` library.

To explicitly load the keywords for a page object, use the `Load Page Object` keyword provided by the `PageObjects` library. If successful, the `PageObjects` library will automatically import the keywords.

For example, call the `Go To Page` keyword followed by a page object reference. If the keyword (or page object reference?) navigates you to the proper page, its keywords will automatically be loaded.

## Page Object Keywords

The `PageObjects` library provides these keywords.

- `Current Page Should Be`
- `Get Page Object`
- `Go To Page Object`
- `Load Page Object`
- `Log Page Object Keywords`
- `Wait For Modal`
- `Wait For Page Object`

## Current Page Should Be

Example: `Current Page Should Be Listing Contact`

This keyword attempts to validate that the given page object represents the current page. Each page object may use its own method for making the determination, but the built-in page objects all compare the page location to an expected pattern (such as `.../lightning/o/...`). If the assertion passes, the keywords for that page object automatically load.

This keyword is useful if you get to a page via a button or some other form of navigation because it lets you assert that you are on the page you think you should be on, and load the keywords for that page, with a single statement.

## Get Page Object

Example: `Get page object Listing Contact`

This keyword is most often used to get the reference to a keyword from another keyword. It is similar in function to robot's built-in `Get Library Instance` keyword. It is rarely used in a test.

## Go To Page

Example: `Go to page Listing Contact`

This keyword attempts to go to the listing page for the Contact object, and then load the keywords for that page.

## Log Page Object Keywords

Example: `Log Page Object Keywords`

This keyword is primarily used as a debugging tool. When called, it will log each of the keywords for the current page object.

## Load Page Object

Example: `Load page object Listing Contact`

This keyword loads the page object for the given `page_type` and `object_name`. It is useful when you want to use keywords from a page object without first navigating to that page (for example, when you are already on the page and don't want to navigate away).

## Wait for Modal

Example: `Wait for modal New Contact`

This keyword can be used to wait for a modal, such as the one that pops up when creating a new object. The keyword returns once a modal appears, and has a title of `New <object_name>` (such as "New Contact").

## Wait for Page Object

Example: Wait for page object `Popup ActivityManager`

Page objects don't have to represent entire pages. You can use the `Wait for page object` keyword to wait for a page object representing a single element on a page, such as a popup window.

## Generic Page Objects

You don't need to create a page object in order to take advantage of page object keywords. If you use one of the page object keywords for a page that does not have its own page object, the `PageObjects` library attempts to find a generic page.

For example, if you use `Current page should be Home Event` and there is no page object by that name, a generic Home page object will be loaded, and its object name will be set to `Event`.

Or let's say your project has created a custom object named `Island`. You don't have a home page, but the object does have a standard listing page. Without creating any page objects, this test works by using generic implementations of the `Home` and `Listing` page objects:

```
*** Test Cases ***
Example test which uses generic page objects
    # Go to the custom object home page, which should
    # redirect to the listing page
    Go To Page Home Islands

    # Verify that the redirect happened
    Current Page Should Be Listing Islands
```

CumulusCI provides these generic page objects.

### Detail

Example: Go to page `Detail Contact ${contact id}`

Detail pages refer to pages with a URL that matches the pattern `<host>/lightning/r/<object name>/<object id>/view`.

### Home

Example: Go to page `Home Contact`

Home pages refer to pages with a URL that matches the pattern `"<host>/lightning/o/<object name>/home"`

## Listing

Example: Go to page Listing Contact

Listing pages refer to pages with a URL that matches the pattern “<host>b/lightning/o/<object name>/list”

## New

Example: Wait for modal New Contact

The New page object refers to the modal that pops up when creating a new object.

Of course, the real power comes when you create your own page object class that implements keywords that can be used with your custom objects.

## Configuring the robot\_libdoc Task

If you define a robot resource file named `MyProject.resource` and place it in the `resources` folder, you can add this configuration to the `cumulusci.yml` file to enable the `robot_libdoc` task to generate documentation.

```
tasks:
  robot_libdoc:
    description: Generates HTML documentation for the MyProject Robot Framework
    ↪Keywords
    options:
      path: robot/MyProject/resources/MyProject.resource
      output: robot/MyProject/doc/MyProject_Library.html
```

To generate documentation for more than one keyword file or library, give a comma-separated list of files for the `path` option, or define `path` as a list under `tasks__robot_libdoc` in the `cumulusci.yml` file.

For example, generate documentation for `MyLibrary.py` and `MyLibrary.resource`.

```
tasks:
  robot_libdoc:
    description: Generates HTML documentation for the MyProject Robot Framework
    ↪Keywords
    options:
      path:
        - robot/MyProject/resources/MyProject.resource
        - robot/MyProject/resources/MyProject.py
      output: robot/MyProject/doc/MyProject_Library.html
```

You can also use basic filesystem wildcards.

For example, to document all Robot files in `robot/MyProject/resources`, configure the `path` option under `tasks__robot_libdoc` in the `cumulusci.yml` file.

```
tasks:
  robot_libdoc:
    description: Generates HTML documentation for the MyProject Robot Framework
    ↪Keywords
    options:
      path: robot/MyProject/resources/*.resource
      output: robot/MyProject/doc/MyProject_Library.html
```



## Using Keywords and Tests from a Different Project

Much like you can use tasks and flows from a different project<sources>`<TODO>, you can also use keywords and tests from other projects. The keywords are brought into your repository the same way as with tasks and flows, via the ``sources` configuration option in the `cumulusci.yml` file. However, keywords and tests require extra configuration before they can be used.

---

**Note:** This feature isn't for general purpose sharing of keywords between multiple projects. It was designed specifically for the case where a product is being built on top of another project and needs access to product-specific keywords.

---

## Using Keywords

In order to use the resources from another project, you must first configure the `robot` task to use one of the sources that have been defined for the project. To do this, add a `sources` option under the `robot` task, and add to it the name of an imported source.

For example, if your project is built on top of NPSP, and you want to use keywords from the NPSP project, first add the NPSP repository as a source in the project's `cumulusci.yml` file:

```
sources:
  npsp:
    github: https://github.com/SalesforceFoundation/NPSP
    release: latest_beta
```

Then add `npsp` under the `sources` option for the `robot` task. This is because the project as a whole can use tasks or flows from multiple projects, but `robot` only needs keywords from a single project.

```
tasks:
  robot:
    options:
      sources:
        - npsp
```

When the `robot` task runs, it adds the directory that contains the code for the other repository to `PYTHONPATH`, which Robot uses when resolving references to libraries and keyword files.

Once this configuration has been saved, you can import the resources as if you were in the NPSP repository.

For example, in a project which has been configured to use NPSP as a source, the `NPSP.robot` file can be imported into a test suite.

```
*** Settings ***
Resource    robot/Cumulus/resources/NPSP.robot
```

---

**Note:** Even with proper configuration, some keywords or keyword libraries might not be usable. Be careful to avoid using files that have the exact same name in multiple repositories.

---

## Running Tests

Running a test from another project requires prefixing the path to the test with the source name. The path needs to be relative to the root of the other repo.

For example, starting from the previous example, to run the `create_organization.robot` test suite from NPSP:

```
$ cci task run robot --suites npsp:robot/Cumulus/tests/browser/contacts_accounts/create_
↪organization.robot
```

### 10.13.2 Robot Tutorial

This tutorial will step you through writing your first test, then enhancing that test with a custom keyword implemented as a page object. It is not a comprehensive tutorial on using Robot Framework. For Robot Framework documentation see the [Robot Framework User Guide](#)

It is assumed you've worked through the CumulusCI *Get Started* section at least up to the point where you've called `cci project init`. It is also assumed that you've read the `robotframework` section of this document, which gives an overview of CumulusCI / Robot Framework integration.

#### Part 1: Folder Structure

We recommend that all Robot tests, keywords, data, and log and report files live under a folder named `robot`, at the root of your repository. If you worked through the *Get Started* section, the following folders will have been created under `MyProject/robot/MyProject`:

- `doc` - a place to put documentation for your tests
- `resources` - a place to put Robot libraries and keyword files that are unique to your project
- `results` - a place for Robot to write its log and report files
- `tests` - a place for all of your tests.

#### Part 2: Creating a custom object

For this tutorial we're going to use a Custom Object named `MyObject` (e.g. `MyObject__c`). In addition, we need a Custom Tab that is associated with that object.

If you want to run the tests and keywords in this tutorial verbatim, you will need to go to Setup and create the following:

1. A Custom Object with the name `MyObject`.
2. A Custom Tab associated with this object.

#### Part 3: Creating and running your first Robot test

The first thing we want to do is create a test that verifies we can get to the listing page of the Custom Object. This will let us know that everything is configured properly.

Open up your favorite editor and create a file named `MyObject.robot` in the folder `robot/MyProject/tests`. Copy and paste the following into this file, and then save it.

```

*** Settings ***
Resource    cumulusci/robotframework/Salesforce.robot
Library    cumulusci.robotframework.PageObjects

Suite Setup    Open test browser
Suite Teardown Delete records and close browser

*** Test Cases ***
Test the MyObject listing page
    Go to page    Listing    MyObject__c
    Current page should be    Listing    MyObject__c

```

**Note:** The above code uses `Go to page` and `Current page should be`, which accept a page type (`Listing`) and object name (`MyObject__c`). Even though we have yet to create that page object, the keywords will work by using a generic implementation. Later, once we've created the page object, the test will start using our implementation.

To run just this test, run the following command at the prompt:

```
$ cci task run robot -o suites robot/MyProject/tests/MyObject.robot --org dev
```

If everything is set up correctly, you should see the output that looks similar to this:

```

$ cci task run robot -o suites robot/MyProject/tests/MyObject.robot --org dev
2019-05-21 17:29:25: Getting scratch org info from Salesforce DX
2019-05-21 17:29:29: Beginning task: Robot
2019-05-21 17:29:29:      As user: test-wftmq9afc3ud@example.com
2019-05-21 17:29:29:      In org: 00Df00000003cuDx
2019-05-21 17:29:29:
=====
MyObject
=====
Test the MyObject listing page                                     | PASS |
-----
MyObject                                                         | PASS |
1 critical test, 1 passed, 0 failed
1 test total, 1 passed, 0 failed
=====
Output:  /Users/boakley/dev/MyProject/robot/MyProject/results/output.xml
Log:     /Users/boakley/dev/MyProject/robot/MyProject/results/log.html
Report:  /Users/boakley/dev/MyProject/robot/MyProject/results/report.html

```

## Part 4: Creating a page object

Most projects are going to need to write custom keywords that are unique to that project. For example, NPSP has a keyword for filling in a batch gift entry form, EDA has a keyword with some custom logic for validating and affiliated contact, and so on.

The best way to create and organize these keywords is to place them in page object libraries. These libraries contain normal Python classes and methods which have been decorated with the `pageobjects` decorator provided by CumulusCI. By using page objects, you can write keywords that are unique to a given page, making them easier to find and easier to manage.

## Defining the class

CumulusCI provides the base classes that are a good starting point for your page object (see [page-object-base-classes](#)). In this case we're writing a keyword that works on the listing page, so we want our class to inherit from the `ListingPage` class.

---

**Note:** Our class also needs to use the `pageobject` decorator, so we must import that along with the `ListingPage` class.

---

To get started, create a new file named `MyObjectPages.py` in the folder `robot/MyProject/resources`. At the top of the new keyword file, add the following import statement:

```
from cumulusci.robotframework.pageobjects import pageobject, ListingPage
```

Next we can create the class definition by adding the following two lines:

```
@pageobject(page_type="Listing", object_name="MyObject__c")
class MyObjectListingPage(ListingPage):
```

The first line registers this class as a page object for a listing page for the object `MyObject__c`. The second line begins the class definition.

## Creating the keyword

At this point, all we need to do to create the keyword is to create a method on this object. The method name should be all lowercase, with underscores instead of spaces. When called from a Robot test, the case is ignored and all spaces are converted to underscores.

In this case we want to create a method named `click_on_the_row_with_name`. All we want it to do is to find a link with the given name, click on the link, and then wait for the new page to load. To make the code more bulletproof, it will use a keyword from `SeleniumLibrary` to wait until the page contains the link before clicking on it. While probably not strictly necessary on this page, waiting for elements before interacting with them is a good habit to get into.

Add the following under the class definition:

```
def click_on_the_row_with_name(self, name):
    xpath='xpath://a[@title="{name}"]'.format(name)
    self.selenium.wait_until_page_contains_element(xpath)
    self.selenium.click_link(xpath)
    self.salesforce.wait_until_loading_is_complete()
```

Notice that the above code is able to use the built-in properties `self.selenium` and `self.salesforce` to directly call keywords in the `SeleniumLibrary` and `Salesforce` keyword libraries.

## Putting it all together

After adding all of the above code, our file should now look like this:

```
from cumulusci.robotframework.pageobjects import pageobject, ListingPage

@pageobject(page_type="Listing", object_name="MyObject__c")
class MyObjectListingPage(ListingPage):
    def click_on_the_row_with_name(self, name):
        xpath='xpath://a[@title="{ }"]'.format(name)
        self.selenium.wait_until_page_contains_element(xpath)
        self.selenium.click_link(xpath)
        self.salesforce.wait_until_loading_is_complete()
```

We now need to import this page object into our tests. In the first iteration of the test, we imported `cumulusci.robotframework.PageObjects`, which provided our test with keywords such as `Go to page` and `Current page should be`. In addition to being the source of these keywords, it is also the way to import page object files into a test case.

To import a file with one or more page objects you need to supply the path to the page object file as an argument when importing `PageObjects`. The easiest way is to use Robot's continuation characters `...` on a separate line.

Modify the import statements at the top of `MyObject.robot` to look like the following:

```
*** Settings ***
Resource cumulusci/robotframework/Salesforce.robot
Library cumulusci.robotframework.PageObjects
... robot/MyProject/resources/MyObjectPages.py
```

This will import the page object definitions into the test case, but the keywords won't be available until the page object is loaded. Page objects are loaded automatically when you call `Go to page`, or you can explicitly load them with `Load page object`. In both cases, the first argument is the page type (eg: *Listing*, *Home*, etc) and the second argument is the object name (eg: `MyObject__c`).

Our test is already using `Go to page`, so our keyword should already be available to us once we've gone to that page.

## Part 5: Adding test data

We want to be able to test that when we click on one of our custom objects on the listing page that it will take us to the detail page for that object. To do that, our test needs some test data. While that can be very complicated in a real-world scenario, for simple tests we can use the Salesforce API to create test data when the suite first starts up.

To create the data when the suite starts, we can add a `Suite Setup` in the settings section of the test. This takes as an argument the name of a keyword. In our case we're going to create a custom keyword right in the test to add some test data for us.

It is not necessary to do it in a setup. It could be a step in an individual test case, for example. However, putting it in the `Suite Setup` guarantees it will run before any tests in the same file are run.

Open up `MyObject.robot` and add the following just before `*** Test Cases ***`:

```
*** Keywords ***
Create test data
    [Documentation]
    ... Creates a MyObject record named "Leeroy Jenkins"
```

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```

...  if one doesn't exist

    # Check to see if the record is already in the database,
    # and return if it already exists
    ${status}  ${result}=  Run keyword and ignore error  Salesforce get  MyObject__c  u
↪Name=Leeroy Jenkins
    Return from keyword if  '${status}'=='PASS'

    # The record didn't exist, so create it
    Log  creating MyObject object with name 'Leeroy Jenkins'  DEBUG
    Salesforce Insert  MyObject__c  Name=Leeroy Jenkins

```

We also need to modify our Suite Setup to call this keyword in addition to calling the Open Test Browser keyword. Since Suite Setup only accepts a single keyword, we can use the built-in keyword Run keywords to run more than one keyword in the setup.

Change the suite setup to look like the following, again using Robot's continuation characters to spread the code across multiple rows for readability.

**Note:** It is critical that you use all caps for AND, as that's the way Robot knows where one keyword ends and the next begins.

```

Suite Setup      Run keywords
...  Create test data
...  AND  Open test browser

```

Notice that our Suite Teardown calls Delete records and close browser. The `_records_` in that keyword refers to any data records created by Salesforce Insert. This makes it possible to both create and later clean up temporary data used for a test.

It is important to note that the suite teardown isn't guaranteed to run if you forcibly kill a running Robot test. For that reason, we added a step in Create test data to check for an existing record before adding it. If a previous test was interrupted and the record already exists, there's no reason to create a new record.

## Part 6: Using the new keyword

We are now ready to modify our test to use our new keyword, since we now have some test data in our database, and the keyword definition in our page object file.

Once again, edit `MyObject.robot` to add the following two statements at the end of our test:

```

Click on the row with name  Leeroy Jenkins
Current page should be  Detail  MyObject__c

```

The complete test should now look like this:

```

*** Settings ***
Resource  cumulusci/robotframework/Salesforce.robot
Library  cumulusci.robotframework.PageObjects
...  robot/MyProject/resources/MyObjectPages.py

Suite Setup      Run keywords

```

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```

... Create test data
... AND Open test browser
Suite Teardown Delete records and close browser

*** Keywords ***
Create test data
    [Documentation] Creates a MyObject record named "Leeroy Jenkins" if one doesn't exist

    # Check to see if the record is already in the database,
    # and do nothing if it already exists
    ${status} ${result}= Run keyword and ignore error Salesforce get MyObject__c
    Name=Leeroy Jenkins
    Return from keyword if '${status}'=='PASS'

    # The record didn't exist, so create it
    Log creating MyObject object with name 'Leeroy Jenkins' DEBUG
    Salesforce Insert MyObject__c Name=Leeroy Jenkins

*** Test Cases ***
Test the MyObject listing page
    Go to page Listing MyObject__c
    Current page should be Listing MyObject__c

    Click on the row with name Leeroy Jenkins
    Current page should be Detail MyObject__c

```

With everything in place, we should be able to run the test using the same command as before:

```

$ cci task run robot -o suites robot/MyProject/tests/MyObject.robot --org dev
2019-05-21 22:02:27: Getting scratch org info from Salesforce DX
2019-05-21 22:02:31: Beginning task: Robot
2019-05-21 22:02:31: As user: test-wftmq9afc3ud@example.com
2019-05-21 22:02:31: In org: 00Df00000003cuDx
2019-05-21 22:02:31:

=====
MyObject
=====
Test the MyObject listing page | PASS |
-----
MyObject | PASS |
1 critical test, 1 passed, 0 failed
1 test total, 1 passed, 0 failed
=====
Output: /Users/boakley/dev/MyProject/robot/MyProject/results/output.xml
Log: /Users/boakley/dev/MyProject/robot/MyProject/results/log.html
Report: /Users/boakley/dev/MyProject/robot/MyProject/results/report.html

```

### 10.13.3 Robot Debugger

CumulusCI includes a rudimentary Robot debugger which can be enabled by setting the `debug` option of the `robot` task to `True`. When the debugger is enabled you can use the `Breakpoint` keyword from the Salesforce keyword library to pause execution.

Once the `Breakpoint` keyword is encountered you will be given a prompt from which you can interactively issue commands.

For the following examples we'll be using this simple test:

```
*** Settings ***
Resource    cumulusci/robotframework/Salesforce.robot

Suite Setup    Open test browser
Suite Teardown Close all browsers

*** Test Cases ***
Example test case
    log    this is step one
    Breakpoint
    log    this is step two
    log    this is step three
```

#### Enabling the debugger

To enable the debugger you must set the `debug` option to `True` for the `robot` task. **You should never do this in your ``cumulusci.yml`` file.** Doing so could cause tests to block when run on a CI server like MetaCI.

Instead, you should set it from the command line when running tests locally.

For example, assuming you have the example test in a file named `example.robot`, you can enable the debugger by running the `robot` task like this:

```
$ cci task run robot -o debug True -o suites example.robot
```

#### Setting breakpoints

The Salesforce keyword library includes a keyword named *Breakpoint*. Normally it does nothing. However, once the debugger is enabled it will cause the test to pause. You will then be presented with a prompt where you can interactively enter commands.

```
$ cci task run robot -o debug True -o suites example.robot
cci task run robot -o debug True -o suites example.robot
2019-10-01 15:29:01: Getting scratch org info from Salesforce DX
2019-10-01 15:29:05: Beginning task: Robot
2019-10-01 15:29:05:      As user: test-dp7to8ww6fec@example.com
2019-10-01 15:29:05:      In org: 00D0R0000000ERx6
2019-10-01 15:29:05:
=====
Example
=====
Example test case
```

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```

:::
::: Welcome to rdb, the Robot Framework debugger
:::

Type help or ? to list commands.

> Example.Example test case
-> <Keyword: cumulusci.robotframework.Salesforce.Breakpoint>
rdb>

```

Note: the `Breakpoint` keyword has no effect on a test if the `debug` option is not set to `True`. While we don't encourage you to leave this keyword in your test cases, it's safe to do so as long as you only ever set the `debug` option when running tests locally.

## Getting Help

Whenever you see the debugger prompt `rdb>`, you can request help by typing `help` or `?` and pressing return. You will be given a list of available commands. To get help with a specific command you can type `help` followed by the command you want help on.

```

rdb> help

Documented commands (type help <topic>):
=====
continue  locate_elements  quit          shell  vars
help      pdb              reset_elements  step   where

rdb> help vars
Print the value of all known variables
rdb>

```

## Examining Variables

There are two ways you can examine the current value of a Robot variable. The simplest method is to enter the name of a variable at the prompt and press return. The debugger will show you the value of that single variable:

```

rdb> ${BROWSER}
chrome

```

To see a list of all variables and their values, enter the command `vars`.

```

rdb> vars

```

Variable	Value
<code>\${/}</code>	<code>/</code>
<code>\${:}</code>	<code>:</code>
<code>\${BROWSER}</code>	<code>chrome</code>

(continues on next page)

(continued from previous page)

```
... <more output> ...
```

## Executing Robot keywords

You can execute Robot keywords at the prompt by entering the command `shell` (or the shortcut `!`) followed by the keyword and arguments just as you would in a test. The following example runs the SeleniumLibrary keyword `Get Location`:

```
rdb> shell get location
status: PASS
result: https://ability-enterprise-4887-dev-ed.lightning.force.com/lightning/setup/
↳ SetupOneHome/home
```

Notice that the `shell` command will run the keyword and then report the status of the keyword and display the return value.

Note: just like in a test, you must separate arguments from keywords by two or more spaces.

## Setting Robot variables

To capture the output of a keyword into a variable, you do it the same way you would do it in a test: use a variable name, two or more spaces, then the keyword:

```
rdb> ! ${loc} get location
status: PASS
${loc} was set to https://ability-enterprise-4887-dev-ed.lightning.force.com/lightning/
↳ setup/SetupOneHome/home
rdb> ${loc}
https://ability-enterprise-4887-dev-ed.lightning.force.com/lightning/setup/SetupOneHome/
↳ home
```

In addition to setting variables from the results of keywords, you can also set variables with the `shell` command using the built-in keywords `Set Test Variable`, `Set Suite Variable`, or `Set Global Variable`.

```
rdb> ! set test variable ${message} hello, world
status: PASS
result: None
rdb> ${message}
hello, world
```

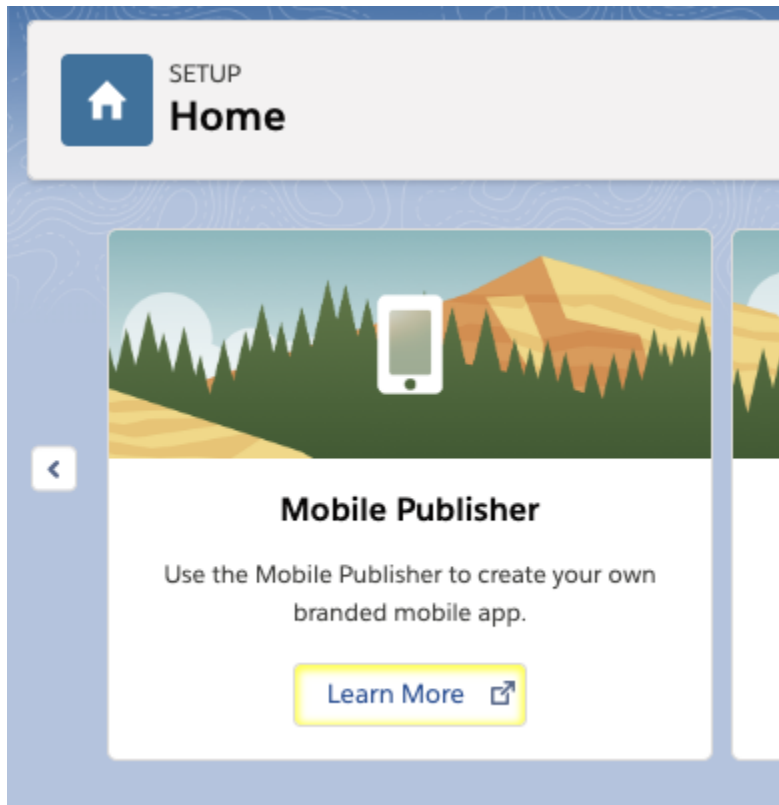
## Locating elements on the web page

One of the most powerful features of the debugger is the ability to locate elements on the screen. This makes it easy to experiment with xpaths or other types of locators.

In the following example, we want to find all items on the page that contain the title “Learn More”:

```
rdb> locate_elements //button[@title='Learn More']
Found 1 matches
```

The elements will be highlighted with a yellow border:



To remove the highlighting you can use the debugger command `reset_elements`

### Step through the test

The debugger allows you to step through a test one keyword at a time. From the `rdb` prompt, enter the command `step` to continue to the next step in the test.

```
rdb> step
.
> Example.Example test case
-> <Keyword: BuiltIn.Log this is step two>
```

The last two lines help to give context. It is showing that you are currently right before the keyword `BuiltIn.Log this is step 2`. To get a full stack you can issue the command `where`

```
rdb> where
0: -> Example
1: -> Example.Example test case
2: -> BuiltIn.Log
```

### Continuing or quitting the test

To let the test continue to the end, or to the next `Breakpoint` keyword, issue the command `continue`. To stop execution gracefully (ie: allow all test and suite teardowns to run), issue the command `quit`.

## CONTINUOUS INTEGRATION

The “CI” in CumulusCI stands for “continuous integration”. Continuous integration is the practice of automatically running a project’s tests for any change before merging that change to the `main` branch in the repository. Continuous integration also configures the repository so that changes are merged only if the tests have passed. This practice keeps the `main` branch in an error-free state where it can be released any time.

Teams can create bespoke automation for CumulusCI tailored to their project’s needs. Once created, the automation is available to all project participants, from developers and quality engineers, to documentation writers and product managers. CumulusCI takes this reuse of automation one step further by letting it run in the context of CI systems like GitHub Actions, CircleCI, or Azure Pipelines. This consistent reuse of automation from local environments to cloud-based CI systems gives teams the ability to develop, test, and deploy their projects with confidence.

### 11.1 CumulusCI Flow

CumulusCI Flow is the process by which Salesforce metadata is developed, tested, and deployed to our customers. It is similar to GitHub Flow, with a few tweaks and additions.

To learn which CumulusCI flows are best designed for creating scratch orgs, running CI builds, managing the development process, and more, see [CumulusCI Flow](#).

### 11.2 CumulusCI in GitHub Actions

GitHub Actions specify custom workflows that run directly in your GitHub repository. These workflows perform a variety of tasks, such as running test suites, performing linting checks on code, and creating code coverage reports. CumulusCI can also execute flows in GitHub Actions, making it possible to run scratch org builds and execute Apex and Robot Framework test passes leveraging the custom automation defined in `cumulusci.yml`.

To learn more about these custom workflows, see our [template repository](#) which is configured to run [CumulusCI Flow](#) using [GitHub Actions](#).

## 11.3 MetaCI

Salesforce.org Release Engineering also maintains a continuous integration system called *MetaCI*. MetaCI is an open source app built to run on Heroku, and is designed specifically to work with CumulusCI and Salesforce. MetaCI's advantages for CumulusCI-based development processes include:

- Easily configuring CumulusCI flows as CI builds.
- Scaling efficiently up to 100 parallel builds without reserving permanent capacity.
- Exposing CumulusCI flows through a web UI for users to create scratch orgs.

Setting up MetaCI requires experience working with apps on Heroku and CumulusCI. To learn more about MetaCI and how to run it with a project, see [MetaCI](#).

## 11.4 Further Reading

### 11.4.1 CumulusCI Flow

CumulusCI Flow is the process that Salesforce.org uses to develop, test, and release our products. This process encompasses both a development and testing philosophy as well as a specific GitHub branching structure. There are several key reasons we like using CumulusCI Flow:

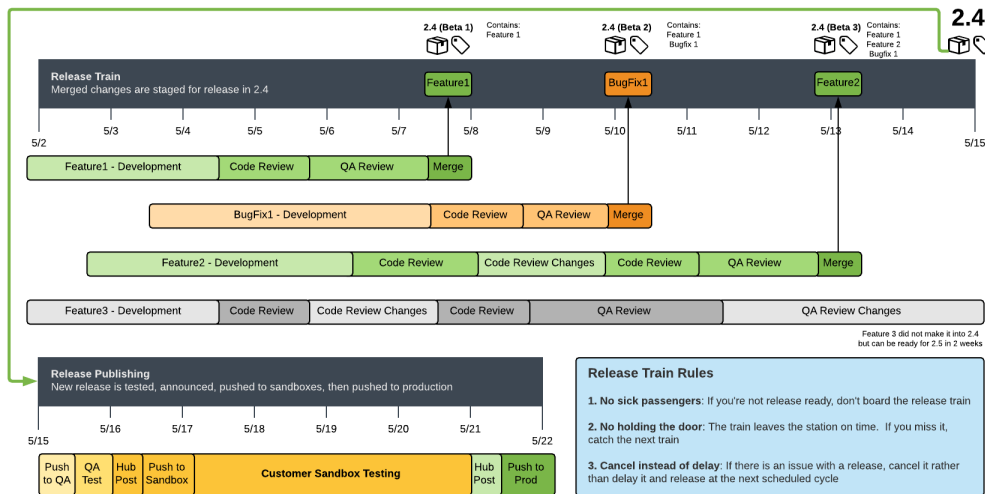
- Everything is done in scratch orgs to eliminate “state drift” that occurs over time in persistent orgs. The only persistent org in this process is the packaging org or production org.
- Changes to branches that are being actively developed are thoroughly tested on each commit.
- For managed package projects, a new beta version of the package is created and tested for each commit on a project's `main` branch.
- Auto-merging functionality keeps branches up-to-date with the `main` branch.

CumulusCI Flow is implemented in the standard library flows provided by CumulusCI, but the approach to working with a GitHub repository does not require the use of CumulusCI.

### Salesforce.org Development / Release Cycle

This diagram shows the development and release process used for Salesforce.org's products. We operate in 2 week development sprints and cut releases at the end of each sprint. Releases are then deployed to QA orgs, tested, published, and pushed out to customers. This regular cycle allows us to operate in the Release Train concept where there are regular, agile releases shipping to customers.

All development work is isolated in feature branches and only merged via a Pull Request after a successful CI build, code review, and QA review to ensure the Release Train is only loaded with release-ready changes to the product. Each merge creates a new beta release with all features currently staged on the Release Train. Each new beta is tested in a variety of environments to ensure functionality works inside a managed package.



## Project Considerations

CumulusCI Flow was designed for use with Salesforce development projects, which inject some unique considerations into finding the right branching model:

- You cannot re-cut a Salesforce first-generation managed package release with the same version as a prior release. As a result, Git Tags are the best representation of our releases in a repository since they are a read only reference to the exact code we put into a given release.
- Releasing managed packages has some overhead involved including manual checks by release managers to ensure nothing gets permanently locked into the package in a release. As a result, true continuous delivery isn't an option. Whether you're on a team that wants to deliver quickly (e.g. a two week sprint cycle) or at team that makes several larger releases a year, CumulusCI offers functionality to help cut releases for all products with any changes.

## Main Builds

The main goal of the CumulusCI Flow is to always have the main branch ready to release. This way, we can merge a fix and cut an emergency release at any time in the development process.

To test that we can package main, we upload a beta release on every commit to main and then test that beta release in a variety of Salesforce org environments concurrently. A passing build is proof we can package main at any point in time.

When the upload of the beta release is completed, the main branch is *auto-merged* into all open feature branches. New betas are published on GitHub as a GitHub Release, along with automatically generated release notes drawn from the content of the Pull Requests merged since the last production release.

## CumulusCI and Main Builds

There are three main flows that facilitate main builds:

- **ci\_master:** Deploys the main branch and all dependencies into the packaging org including incrementally deleting any metadata removed since the previous deployment. The end result is to prepare the packaging org to upload a new version.
- **release\_beta:** Uploads a beta release of the code staged in the packaging org, creates a GitHub Tag and Release, generates release notes, adds them to the release, and merges `main` into all feature branches.
- **ci\_beta:** Installs the beta and all dependencies into a fresh scratch org and runs the Apex tests.

## CumulusCI and Tag Naming

CumulusCI Flow uses two different tag prefixes for differentiating between beta and production releases of a managed package. The default prefix values for tags are `beta/` and `release/`.

- Example beta release tag: `beta/1.2-Beta_3`
- Example production release tag: `release/1.2`

By differentiating beta and release tags, we allow tooling to query for the latest beta and the latest production release of each repository.

To change the default prefix values see [branch configuration](#).

## Feature Branches

Like GitHub Flow, CumulusCI Flow uses a simple main/feature branch model. The main branch is the only permanent branch in the repository. All development work (features and bug fixes) is done in feature branches prefixed with `feature/`. All commits on all feature branches are tested concurrently via continuous integration, such as MetaCI or another solution.

Once a developer is done with a feature branch, they create a Pull Request to merge their branch into the main branch. The Pull Review serves as the container for the following:

- **Code Review:** We use GitHub's built in review functionality for Pull Requests to conduct line by line code reviews
- **Release Notes:** We use the Pull Request body to create release notes content relevant to the PR. This content is automatically parsed by CumulusCI's release notes generation task to automatically build cumulative release notes on each release.
- **QA:** The goal of the Pull Request is to serve as a gate blocking a change from going into main until it's ready to release. As a result, we do QA on the feature before merging the Pull Request.

When a Pull Request is approved and passing build, it is merged using the Merge button in GitHub's web interface. We use GitHub Protected Branches to enforce both code reviews and passing builds before a Pull Request can be merged to main.

Once the Pull Request is merged, the feature branch is deleted.



## Feature Branch Flows

CumulusCI facilitates working with feature branches (mainly) through two default flows:

- **dev\_org:** Used to deploy the unmanaged code and all dependencies from the feature branch into a Salesforce org to create a usable development environment.
- **ci\_feature:** Deploys the unmanaged code and all dependencies into a Salesforce org (typically a fresh scratch org) and run the Apex tests. This flow is run by a CI app on new commits to any feature branch.

## Release Branches

Some teams deliver large releases several times a year. For this type of release cadence, Salesforce.org uses a special type of branch referred to as a release branch. Release branches are simply a feature branch named with a number. These long-lived branches are created off of the `main` branch, serve as the target branch for all features associated with that release and are eventually merged back to the `main` branch when a release occurs. To be able to clearly track what work is associated with a specific release, release branches must fulfill these criteria:

- They are the parent branches of *all* feature work associated with a release. That is, all feature branches associated with a release are child branches of the target release branch.
- Release branches use a strict naming format: `feature/release_num` where `release_num` is a valid integer.

Using the `feature/` branch prefix for the release branch names allow those branches to stay in sync with the `main` branch. Like any other feature branch, they participate in CumulusCI's parent-to-child merge operations. The release number immediately after the `feature/` prefix allows CumulusCI to detect and merge changes from one release branch to other future release branches. See [Release to \(Future\) Release Merges](#) for more information.

An example of a release branch with two items of work associated with it could look like this:

- `feature/001`
- `feature/001__feature1`
- `feature/001__feature2`

## Branch Configuration

The name of the main (default) branch, as well as the branch prefixes are configurable in your projects `cumulusci.yml` file. The following shows the default values that CumulusCI comes with:

```
project:
  git:
    default_branch: main
    prefix_feature: feature/
    prefix_beta: beta/
    prefix_release: release/
```

These values can be changed to match naming conventions used by your own project.

## Auto Merging

CumulusCI Flow helps to keep large diffs and merge conflicts from being the norm. CumulusCI's auto-merge functionality helps teams:

- Keep feature branches up-to-date with the `main` branch (main to feature merges)
- Manage long-lived feature branches for larger features worked on by multiple developers (parent to child merges)
- Manage large releases that occur several times a year (release to future release merges).

## Main to Feature Merges

One of the bigger differences between CumulusCI Flow and GitHub Flow or git-flow is that CumulusCI Flow automates the merging of commits to a project's `main` branch into all open feature branches. This auto-merge does a lot for us:

- Ensures feature branches are in sync with the `main` branch.
- Re-tests each feature branch with any changes to `main` since the merge generates a new commit.
- Eliminates merge conflicts when merging a Pull Request to `main`.

To understand the benefit of auto-merging to feature branches, consider the following scenario: A developer starts work on a feature branch, puts in a few weeks on it, and then has to leave unexpectedly for a few months. While they are on leave, their feature branch gets automatically updated with any new commits on `main` and rebuilt. A few weeks into their leave, a new commit on `main` gets merged to their feature branch and breaks the build. When the developer returns after their leave, they can look at the build history to find which commit from `main` broke their feature branch.

Without auto-merging, the developer would return, merge `main` into their feature branch, and then have to sift through all the commits to `main` during their leave to figure out which one broke their feature branch. More testing and build history is always a good thing in addition to the other benefits we gain from auto-merging.

CumulusCI facilitates the auto-merge to feature branches via the `github_automerge_main` task, which is included by default in the `release_beta` flow. The `release_beta` flow is run, in CumulusCI Flow, on new commits to the `main` branch.

## Parent to Child Merges

There is sometimes a need for multiple developers to collaborate on different parts of a single larger feature. To enable this collaboration CumulusCI expands the concept of auto-merging main-to-feature branches to also handle the concept of Parent and Child Feature Branches.

Parent/Child feature branches are created using a simple naming format:

- **Parent:** `feature/parent-branch-name`
- **Child:** `feature/parent-branch-name__child-branch-name`

A child branch extends the parent's name with two additional underscores (`__`) and an additional description.

Auto-merging from parent to child branches works as follows:

- Child branches never receive the auto-merge from `main`
- Parent branches do receive the merge from `main` which kicks off a Feature Test build. (This assumes the parent branch is not itself a child.)
- At the end of a successful Feature Test build on a Parent branch, the parent branch is auto-merged into all child branches

This allows us to support multiple developers working on a single large feature while keeping that feature isolated from main until we're ready to release it. The parent branch is the branch representing the overall feature. Each developer can create child branches for individual components of the larger feature. Their child branch still gets CI builds like all feature branches. When they are ready to merge from their child branch to the parent branch, they create a Pull Request which gets code reviewed by other developers working on the parent feature branch and finally merged to the parent branch.

CumulusCI facilitates parent to child auto-merges via the `github_automerge_feature` task, which is included by default in the `ci_feature` flow. If a parent feature branch passes the build, it is automatically merged into all child branches.

The parent to child merge functionality works across *multiple levels* of branching. The effects of automerging remains the same, with children only receiving merges from their parents only (e.g. no merges from grandparents) This allows us to have branching structures such as:

- `main`
- `feature/large-feature`
- `feature/large-feature__section1`
- `feature/large-feature__section1__work-item1`
- `feature/large-feature__section1__work-item2`
- `feature/large-feature__section2`
- `feature/large-feature__section2__work-item1`

In this scenario, a commit to the `main` branch triggers the `github_automerge_main` task to run and will automerge that commit into `feature/large-feature`. This triggers a build to run against `feature/large-feature`, and assuming the build passes, runs the `github_automerge_feature` task. This task detects two child branches of `feature/large-feature`: `feature/large-feature__section1` and `feature/large-feature__section2`. The task automerges the commit from the parent, into the child branches, and builds begin to run against those branches. If the build for `feature/large-feature__section1` fails, it does not trigger `github_automerge_feature` to merge to its child branches. This means that despite `feature/large-feature__section1` having two child branches, they would not receive automerges until the parent branch tests successfully.

## Release to (Future) Release Merges

Because release branches are so long-lived, and so much work goes into them, their diffs can get quite large. This means headaches are inevitable the day after a major release, and you need to pull down all of the changes from the new release into the next release branch (which has likely been in development for months already). To alleviate this pain point, CumulusCI can ensure that all release branches propagate commits they receive to other existing release branches that correspond to future releases.

Consider the following branches in a GitHub repository:

- `main` - Source of Truth for Production
- `feature/002` - The next major production release
- `feature/002__feature1` - A single feature associated with release 002
- `feature/002__large_feature` - A large feature associated with release 002
- `feature/002__large_feature__child1` - First chunk of work for the large feature
- `feature/002__large_feature__child2` - Second chunk of work for the large feature
- `feature/003` - The release that comes after 002
- `feature/003__feature1` - A single feature associated with release 003

In this scenario, CumulusCI ensures that when `feature/002` receives a commit, that that commit is also merged into `feature/003`. This kicks off tests in our CI system and ensures that functionality going into `feature/002` doesn't break work being done for future releases. Once those tests pass, the commit on `feature/003` is merged to `feature/003__feature1` because they adhere to the parent/child naming convention described above. Commits **never** propagate in the opposite direction. (A commit to `feature/002` would never be merged to `feature/001` if it was an existing branch in the GitHub repository).

**Propagating commits to future release branches is turned off by default.** If you would like to enable this feature for your GitHub repository, you can set the `update_future_releases` option on the `github_automerge_feature` task in your `cumulusci.yml` file:

```
tasks:
  github_automerge_feature:
    options:
      update_future_releases: True
```

## Orphan Branches

If you have both a parent and a child branch, and the parent is deleted, this creates an orphaned branch. Orphaned branches do not receive any auto-merges from any branches. You can rename an orphaned branch to include the `feature/` prefix and contain no double underscores (`'__'`) to begin receiving merges from the main branch again.

If we have a parent and child branch: `feature/myFeature` and `feature/myFeature__child`, and `feature/myFeature` (the parent) is deleted, then `feature/myFeature__child` would be considered an orphan. Renaming `feature/myFeature__child` to `feature/child` will allow the orphan to begin receiving automerges from the main branch.

## CumulusCI Flow vs. GitHub Flow

Since CumulusCI Flow is largely an extension of GitHub Flow, the differences are mostly additional processes in CumulusCI Flow that help make it more effective for large-scale Salesforce projects:

- Feature branches must be prefixed `feature/` or they don't get built or receive auto-merges. This allows developers to have experimental branches that don't get built or merged.
- CumulusCI Flow is focused on an agile release process that works well with the technical constraints of Salesforce packaging..
- CumulusCI Flow requires the beta and release tag naming convention so tooling can use the GitHub API to determine the latest beta and the latest production release.
- CumulusCI Flow utilizes parent/child branch relationships and performs auto-merging of commits between branches, where as GitHub flow does not.

## CumulusCI Flow vs git-flow

When our team first started figuring out our development/release process, we started where most people do in looking at `git-flow`. Unlike both CumulusCI Flow and GitHub Flow, `git-flow` uses multiple permanent branches to separate development work from releases. We decided to go with a `main/feature` branching model instead of `git-flow` for a few reasons:

- We only cut and release new releases. We never patch old releases which makes the complexity of `git-flow` less necessary.

- git-flow is not natively supported in git or GitHub. Using git-flow effectively usually requires extending your git tooling to enforce structure and merging rules for a more complex branching model.
- The main reason for git-flow is to be able to integrate your features together. We get this, along with many other benefits, already from auto-merging main to feature branches.
- Feature branches provide better isolation necessary for a rapid, agile release cycle by keeping all features not ready for release out of the release. Doing testing in the development branch means you've already integrated your features together. If one feature is bad, it is harder to unwind that feature from the development branch than if it were still isolated in its feature branch, tested there, and only merged when truly ready. Plus, with the auto-merge of main, we get the same integration as a development branch.
- In short, auto-merging and parent/child feature branches in CumulusCI Flow provide us everything we would want from git-flow in a simpler branching model.

### 11.4.2 Testing with Second-Generation Packaging

CumulusCI makes it easy to harness the power of second-generation managed packages to implement an advanced, comprehensive testing process for *both* first- and second-generation managed package products.

This process yields multiple benefits:

- You can test managed packages *as* managed packages, but before merging code.
- You gain the ability to perform end-to-end testing across applications that span multiple packages earlier in the development lifecycle.
- For existing 1GP products, it also allows for the creation of a full-scale 2GP testing and development framework *before* migrating products from 1GP to 2GP. Migration, when generally available, will be much easier because products are already being tested as 2GPs.

Salesforce.org is actively using this process for feature-level testing and end-to-end testing of dozens of existing first-generation packages, while preparing for the migration into second-generation packaging. This process is also applicable for testing products that started as second-generation packages.

#### Building 2GP Beta Packages in Continuous Integration

Any managed package product - first or second generation - can use CumulusCI automation to build and test 2GP beta packages. The out-of-the-box flow `build_feature_test_package` can be run on any commit. This flow builds a 2GP beta package using an alternate package name (which defaults to `<project name> Managed Feature Test`, reflecting its intended role in supporting feature-branch testing) but with the same namespace as the main package.

The 2GP test package is also built using the `Skip Validation` option, which defers validation of the package until install time. Skipping validation ensures that feature test packages build extremely quickly, and also avoids locking in dependency versions - making it easy to achieve complex end-to-end testing workflows, as described in [End-to-End Testing with Second-Generation Packages](#).

CumulusCI stores data about feature test packages in GitHub commit-status messages. When the `build_feature_test_package` flow completes successfully, the `04t` id of the created package version is stored in the "Build Feature Test Package" commit status on GitHub. Testing and 2GP build flows can acquire the package version from this store.

## 2GP Tests for Feature Branches

The `ci_feature_2gp` flow parallels `ci_feature`, which is used for unmanaged feature testing in continuous integration, but uses a 2GP feature test package instead of deploying the project unmanaged.

When executed on a specific commit, the flow acquires a 2GP feature test package id from the “Build Feature Test Package” commit status on that commit. It installs that package, then executes Apex unit tests.

---

**Note:** The `ci_feature_2gp` flow is intended for use after the `build_feature_test_package` flow. On MetaCI, this is implemented by using a Commit Status trigger to run `ci_feature_2gp`; on other CI systems, a `ci_feature_2gp` build may be made dependent on a `build_feature_test_package` build.

---

Running 2GP tests in CI can replace the use of namespaced scratch orgs for most automated testing objectives. 2GP testing orgs provide a more accurate representation of how namespaces are applied and how metadata will behave once packaged, making it possible to catch packaging-related issues *before* code is merged to the main branch or deployed to a 1GP packaging org.

---

**Note:** Component coverage for first- and second-generation packages is very similar, but some projects may use components with differing behaviors. Consult the [Metadata Coverage Report](#) with any questions.

---

Manual QA can be executed on feature branches via the flow `qa_org_2gp`, which operates just like `ci_feature_2gp` but which also executes `config_qa` to prepare an org for manual testing. Similarly, Robot tests may be executed against 2GP orgs by running `qa_org_2gp` instead of `qa_org` before invoking `robot`.

## End-to-End Testing with Second-Generation Packages

The `qa_org_2gp` flow allows for performing manual and automated end-to-end tests of multi-package products sooner in the development lifecycle than was previously possible. Take the following example:

- Product B has a dependency on Product A.
- Product B is developing a new feature that is dependent on a new feature being developed for Product A.

Without the ability to test with 2GP packages, end-to-end testing on Product A and B’s linked features could only occur once both products have moved significantly forward in the development lifecycle:

- Both A and B merge their feature work into their main branch in a source control system.
- New feature metadata is uploaded to the packaging org, if the products are 1GPs.
- New beta versions for both Product A and B are created
- In many cases, a production release for Product A must also be created to satisfy B’s dependency, if the packages are 1GPs.

Once all of the steps above have occurred, end-to-end testing with new managed package versions can take place. However, if *any* errors are found at this point the entire process has to start over again, and first-generation packages may have already incurred component lock-in. With 2GP testing, this is no longer the case.

Instead, a tester may execute the `qa_org_2gp` flow from a feature branch in the repository of Product B. The following will occur:

1. CumulusCI resolves dependencies as they are defined Product B’s `cumulusci.yml` file, using the `commit_status` resolution strategy. CumulusCI matches the current branch and release against branches in the upstream dependencies to locate the most relevant 2GP packages for this testing process. See [Controlling GitHub Dependency Resolution](#) for more details.

2. CumulusCI installs suitable 2GP feature test packages for Product A and any other dependencies, if found, or falls back to 1GP packages if not found.
3. CumulusCI installs a Project B 2GP feature test package, sourced from a GitHub commit status on the current commit. (The commit must have been pushed, and `build_feature_test_package` must have run successfully).
4. Finally, CumulusCI executes the `config_qa` flow to prepare the org for use in testing.

This allows for full end-to-end testing of features that have inter-package-dependencies prior to the merging of code to any long-lived branches (e.g. a release branch or `main`). Because CumulusCI defaults to building packages using `Skip Validation`, any suitable 2GP feature test package installed for Project A may satisfy the dependency, making it possible to test feature development without committing to package version numbers or specific dependency versions.

The process, backed by second-generation packaging, maximizes the utility of feature-level testing processes for both first- and second-generation packages, while helping prepare first-generation packages to migrate to 2GP once migration becomes generally available.

### 11.4.3 Run CumulusCI Headlessly

CumulusCI can be used to run continuous integration builds in your CI system.

This section outlines how to setup services and orgs that can be defined in a particular environment such that they will be recognized by CumulusCI.

#### Register Environment Services

It is often the case that services you use for local development will differ from the services that you want to use in your build system. For example, developers will setup a GitHub service locally that is associated with their GitHub User, while an integration build may want to run as an integration user when interacting with GitHub. By providing environment variables with specific prefixes, CumulusCI can detect and register those services for use when running tasks and flows.

#### Name Environment Services

Environment variables that define CumulusCI services adhere to the following format:

```
CUMULUSCI_SERVICE_<service_type>[__service_name]
```

All services should start with the prefix `CUMULUSCI_SERVICE_` followed immediately by the `service_type` (for a full list of available services run `cci service list`). Additionally, you have the option to provide a unique name for your service by adding a double underscore (`__`) followed by the name you wish to use. If a name is specified it is prepended with `env-` to help establish that this service is coming from the environment. If a name is not specified, a default name of `env` is used for that service.

Here are some examples of environment variable names along with their corresponding service types and names:

- `CUMULUSCI_SERVICE_github` → A `github` service that will have the default name of `env`
- `CUMULUSCI_SERVICE_github__integration-user` → A `github` service that will have the name `env-integration-user`
- `CUMULUSCI_SERVICE_connected_app` → A `connected_app` service with the default name of `env`
- `CUMULUSCI_SERVICE_connected_app__sandbox` → A `connected_app` service with the name `env-sandbox`



By always prepending `env` to the names of services specified by environment variables, it is easy to see which services are currently set by environment variables and which are not.

## Environment Service Config Values

The value of the environment variables (i.e. everything that comes after the `=` character) are provided in the form of a JSON string. The following shows an example that defines a `github` service via an environment variable:

```
CUMULUSCI_SERVICE_github='{ "username": "jdoe", "email": "jane.doe@some.biz", "token": "  
↪<personal_access_token>" }'
```

These values provide CumulusCI with the required attributes for a particular service. The easiest way to find what attributes are needed for a particular service is to look for your service under the [services tag in the CumulusCI standard library](#) and provide values for all “attributes” listed under the desired service. You can also use `cci service info` to get the values from a service you’ve configured locally.

For example, if you’re looking to register a `connected_app` service, then the attributes: `callback_url`, `client_id`, and `client_secret` would need to be provided in the following format:

```
'{ "callback_url": "<callback_url>", "client_id": "<client_id>", "client_secret": "  
↪<client_secret>" }'
```

## Register Persistent Orgs

Certain builds may require working with one or more persistent orgs. Using the JWT flow for authentication is the recommended approach when running CumulusCI headlessly for continuous integration with an existing org.

First, you need a Connected App that is configured with a certificate in the “Use digital signatures” setting in its OAuth settings. You can follow the [Salesforce DX Developer Guide](#) to get this set up:

- [Create a private key and self-signed certificate](#)
- [Create a Connected App](#)

Once you have a Connected App created, you can configure CumulusCI to use this Connected App to login to a persistent org by setting the following environment variables.

- `CUMULUSCI_ORG_orgName`
- `SFDX_CLIENT_ID`
- `SFDX_HUB_KEY`

See the below entries for the values to use with each.

---

**Important:** Setting the above environment variables negates the need to use the `cci org connect` command. You can simply run a `cci` command and pass the `--org orgName` option, where `orgName` corresponds to the name used in the `CUMULUSCI_ORG_*` environment variable.

---

In the context of GitHub Actions, all of these environment variables would be declared under the `env` section of a workflow. Below is an example of what this would look like:

```
env:  
  CUMULUSCI_ORG_sandbox: { "username": "just.in@salesforce.org", "instance_url":  
↪ "https://sfd0--sbxname.my.salesforce.com" }
```

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```
SFDX_CLIENT_ID: {{ $secrets.client_id }}
SFDX_HUB_KEY: {{ $secrets.server_key }}
```

The above assumes that you have `client_id` and `server_key` setup in your GitHub [encrypted secrets](#)

The name of this environment variable defines what name to use for the value of the `--org` option. For example, a value of `CUMULUSCI_ORG_mySandbox` would mean you use `--org mySandbox` to use this org in a `cci` command.

Set this variable equal to the following json string:

```
{
  "username": "USERNAME",
  "instance_url": "INSTANCE_URL"
}
```

- `USERNAME` - The username of the user who will login to the target org.
- `INSTANCE_URL` - The instance URL for the org. Should begin with the `https://` schema.

You can see an example of setting this environment variable in a GitHub actions workflow in our [demo repository](#).

---

### Wizard Note

If the target org's instance URL is instanceless (i.e. does not contain a segment like `cs46` identifying the instance), then for sandboxes it is also necessary to set `SFDX_AUDIENCE_URL` to `https://test.salesforce.com`. This instructs CumulusCI to set the correct `aud` value in the JWT (which is normally determined from the instance URL).

---

Set this to your Connected App's client id. This, combined with the `SFDX_HUB_KEY` variable instructs CumulusCI to authenticate to the org using the [JWT Bearer Flow](#) instead of the [Web Server Flow](#).

Set this to the private key associated with your Connected App (this is the contents of your `server.key` file). This combined with the `SFDX_CLIENT_ID` variable instructs CumulusCI to authenticate to the org using the [JWT Bearer Flow](#) instead of the [Web Server Flow](#).

## Multiple Services of the Same Type

In rare cases a build may need to utilize multiple services of the same type. To set a specific service as the default for subsequent tasks/flows run the `cci service default <service_type> <name>` command. You can run this command again to set a new default service to be used for the given service type.

### 11.4.4 Run CumulusCI from Github Actions

CumulusCI can be used to run continuous integration builds with GitHub Actions. In order to follow along, you should already have a repository that is hosted on GitHub and configured as a CumulusCI project. In other words, we're assuming your project already has a `cumulusci.yml` and that you are successfully running CumulusCI flows locally.

There is also a [template repository](#) that is setup to run [CumulusCI Flow](#) with GitHub actions. This repository can be used as a starting point for implementing your own project or as a reference for the following material.

---

**Note:** GitHub Actions are free for open source (public) repositories. Check with GitHub about pricing for private repositories.

---

## Create a GitHub Action Workflow

In GitHub Actions, you can define *workflows* which run automatically in response to events in the repository. We're going to create an action called `Apex Tests` which runs whenever commits are pushed to a target GitHub repository.

Workflows are defined using files in YAML format in the `.github/workflows` folder within the repository. To set up the `Apex Tests` workflow, use your editor to create a file named `apex_tests.yml` in this folder and add the following contents:

```
name: Apex Tests

on: [push]

env:
  CUMULUSCI_SERVICE_github: ${ secrets.CUMULUSCI_SERVICE_github }}

jobs:
  unit_tests:
    name: "Run Apex tests"
    runs-on: ubuntu-latest
    steps:
      - uses: actions/checkout@v2
      - name: Install Salesforce CLI
        run: |
          mkdir sfdx
          wget -qO- https://developer.salesforce.com/media/salesforce-cli/sfdx/channels/
      ↪ stable/sfdx-linux-x64.tar.xz | tar xJ -C sfdx --strip-components 1
          echo $(realpath sfdx/bin) >> $GITHUB_PATH
      - name: Authenticate Dev Hub
        run: |
          echo ${ secrets.SFDX_AUTH_URL }} > sfdx_auth
          sfdx force:auth:sfdxurl:store -f sfdx_auth -d
      - name: Set up Python
        uses: actions/setup-python@v1
        with:
          python-version: "3.8"
      - name: Install CumulusCI
        run: |
          python -m pip install -U pip
          pip install cumulusci
      - run: |
          cci flow run ci_feature --org dev --delete-org
```

This workflow defines a *job* named `Run Apex Tests` which will run these steps in the CI environment after any commits are pushed:

1. Check out the repository at the commit that was pushed
2. Install the Salesforce CLI and authorize a Dev Hub user
3. Install Python 3.8 and CumulusCI
4. Run the `ci_feature` flow in CumulusCI in the dev scratch org, and then delete the org. The `ci_feature` flow deploys the package and then runs its Apex tests.

## Configure Secrets

You may have noticed that the workflow refers to a couple of “secrets”: `CUMULUSCI_SERVICE_github` and `SFDX_AUTH_URL`. You need to add these secrets to the repository settings before you can use this workflow.

To find the settings for Secrets, open your repository in GitHub. Click the Settings tab. Then click the Secrets link on the left.

### `CUMULUSCI_SERVICE_github`

CumulusCI may need access to the GitHub API in order to do things like look up information about dependency packages. To set this up, we’ll set a secret to configure the CumulusCI github service.

First, follow GitHub’s instructions to [create a Personal Access Token](#). Be sure to select repo and gist scope:

Select scopes
Scopes define the access for personal tokens. [Read more about OAuth scopes.](#)

<input checked="" type="checkbox"/> <b>repo</b>	Full control of private repositories
<input checked="" type="checkbox"/> <b>repo:status</b>	Access commit status
<input checked="" type="checkbox"/> <b>repo_deployment</b>	Access deployment status
<input checked="" type="checkbox"/> <b>public_repo</b>	Access public repositories
<input checked="" type="checkbox"/> <b>repo:invite</b>	Access repository invitations
<input checked="" type="checkbox"/> <b>security_events</b>	Read and write security events
<input type="checkbox"/> <b>workflow</b>	Update GitHub Action workflows
<input type="checkbox"/> <b>write:packages</b>	Upload packages to GitHub Package Registry
<input type="checkbox"/> <b>read:packages</b>	Download packages from GitHub Package Registry
<input type="checkbox"/> <b>delete:packages</b>	Delete packages from GitHub Package Registry
<input type="checkbox"/> <b>admin:org</b>	Full control of orgs and teams, read and write org projects
<input type="checkbox"/> <b>write:org</b>	Read and write org and team membership, read and write org projects
<input type="checkbox"/> <b>read:org</b>	Read org and team membership, read org projects
<input type="checkbox"/> <b>admin:public_key</b>	Full control of user public keys
<input type="checkbox"/> <b>write:public_key</b>	Write user public keys
<input type="checkbox"/> <b>read:public_key</b>	Read user public keys
<input type="checkbox"/> <b>admin:repo_hook</b>	Full control of repository hooks
<input type="checkbox"/> <b>write:repo_hook</b>	Write repository hooks
<input type="checkbox"/> <b>read:repo_hook</b>	Read repository hooks
<input type="checkbox"/> <b>admin:org_hook</b>	Full control of organization hooks
<input checked="" type="checkbox"/> <b>gist</b>	Create gists

Now, in your repository's Secrets settings, click the "Add a new secret" link. Enter `CUMULUSCI_SERVICE_github` as the Name of the secret. For the Value, enter the following JSON:

```
{"username": "USERNAME", "password": "TOKEN", "email": "EMAIL"}
```

Click the "Add secret" button to save the secret.

Replace `USERNAME` with your GitHub username, `TOKEN` with the Personal Access Token you just created, and `EMAIL` with your email address.

---

**Note:** For more information on registering services in a headless environment see the Register Services section of the docs.

---

### SFDX\_AUTH\_URL

CumulusCI needs to be able to access a Salesforce org with the Dev Hub feature enabled in order to create scratch orgs. The easiest way to do this is to set up this connection locally, then copy its SFDX auth URL to a secret on GitHub.

Since you already have CumulusCI working locally, you should be able to run `sfdx force:org:list` to identify the username that is configured as the default Dev Hub username (it is marked with (D)).

Now run `sfdx force:org:display --verbose -u [username]`, replacing `[username]` with your Dev Hub username. Look for the `Sfdx Auth Url` and copy it.

**Attention:** Treat this URL like a password. It provides access to log in as this user!

Now in your repository's Secrets settings, click the 'Add a new secret' link. Enter `SFDX_AUTH_URL` as the Name of the secret, and the URL from above as the Value. Click the 'Add secret' button to save the secret.

---

### Advanced Note

These instructions connect `sfdx` to your Dev Hub using the standard Salesforce CLI Connected App and a refresh token. It is also possible to authenticate `sfdx` using the `force:auth:jwt:grant` command with a custom Connected App client id and private key.

---

Your Secrets should look like this:

SFDO-Tooling / CumulusCI-Test

Unwatch 26 Star 7 Fork 148

Code Issues 4 Pull requests 5 Actions Projects 0 Security Insights Settings

Options

Manage access

Branches

Webhooks

Notifications

Integrations

Deploy keys

**Secrets**

Actions

Security alerts

## Secrets

Secrets are environment variables that are **encrypted** and only exposed to selected actions. Anyone with **collaborator** access to this repository can use these secrets in a workflow.

Secrets are not passed to workflows that are triggered by a pull request from a fork. [Learn more](#).

CUMULUSCI\_SERVICE\_github Remove

SFDX\_AUTH\_URL Remove

[Add a new secret](#)

## Test the Workflow

Now you should be able to try out the workflow. Commit the new `.github/workflows/apex_tests.yml` file to the repository and push the commit to GitHub. You should be able to watch the status of this workflow in the repository's Actions tab:

SFDO-Tooling / CumulusCI-Test

Unwatch 26 Star 7 Fork 148

Code Issues 4 Pull requests 5 **Actions** Projects 0 Security Insights Settings

**Add CUMULUSCI\_KEY**  
feature/gh-ci 2f7fa64 Cancel workflow

▼ Apex Tests  
on: push

Run Apex tests

Apex Tests / Run Apex tests  
started 13s ago

Search logs

- Set up job 3s
- Run actions/checkout@v2 2s
- Install sfdx 8s
- Set up Python
- Install CumulusCI
- Run cci flow run ci\_feature --org dev --delete-org
- Post actions/checkout@v2

If you open a pull request for a branch that includes the workflow, you will find a section at the bottom of the pull request that shows the results of the checks that were performed by the workflow:

✓ **All checks have passed** [Hide all checks](#)

1 successful check

✓ **Apex Tests / Run Apex tests (push)** Successful in 3m [Details](#)

It is possible to configure the repository's main branch as a *protected branch* so that changes can only be merged to it

if these checks are passing.

See GitHub's documentation for instructions to [configure protected branches](#) and [enable required status checks](#).

## Run Headless Browser Tests

It is possible to run Robot Framework tests that control a real browser as long as the CI environment has the necessary software installed. For Chrome, it must have Chrome and chromedriver. For Firefox, it must have Firefox and geckodriver.

Fortunately GitHub Actions comes preconfigured with an image that includes these browsers. However it is necessary to run the browser in headless mode. When using CumulusCI's `robot` task, this can be done by passing the `-o vars BROWSER:headlesschrome` option.

Here is a complete workflow to run Robot Framework tests for any commit:

```
name: Robot Tests

on: [push]

env:
  CUMULUSCI_SERVICE_github: ${ secrets.CUMULUSCI_SERVICE_github }

jobs:
  unit_tests:
    name: "Run Robot Framework tests"
    runs-on: ubuntu-latest
    steps:
      - uses: actions/checkout@v2
      - name: Install Salesforce CLI
        run: |
          mkdir sfdx
          wget -qO- https://developer.salesforce.com/media/salesforce-cli/sfdx/channels/
↪ stable/sfdx-linux-x64.tar.xz | tar xJ -C sfdx --strip-components 1
          echo $(realpath sfdx/bin) >> $GITHUB_PATH
      - name: Authenticate Dev Hub
        run: |
          echo ${ secrets.SFDX_AUTH_URL } > sfdx_auth
          sfdx force:auth:sfdxurl:store -f sfdx_auth -d
      - name: Set up Python
        uses: actions/setup-python@v1
        with:
          python-version: "3.8"
      - name: Install CumulusCI
        run: |
          python -m pip install -U pip
          pip install cumulusci
      - run: |
          cci task run robot --org dev -o vars BROWSER:headlesschrome
      - name: Store robot results
        uses: actions/upload-artifact@v1
        with:
          name: robot
          path: robot/CumulusCI-Test/results
```

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```
- name: Delete scratch org
  if: always()
  run: |
    cci org scratch_delete dev
```

## Deploy to a Persistent Org

**Note:** For instructions on setting up a connection to a persistent org in a headless environment see the [Register Persistent Orgs](#) section of the docs.

The final step in a CI pipeline is often deploying newly-verified changes into a production environment. In the context of a Salesforce project, this could mean a couple of different things. It could mean that you want to deploy changes in a managed package project into a packaging org. It could also mean that you want to deploy changes in a project to a production org.

The following sections cover which tasks and flows you would want to consider based on your project's particular needs.

## Deploy to a Packaging Org

When working on a managed package project, there are two standard library flows that are generally of interest when deploying to a packaging org: `deploy_packaging` and `ci_master`.

The `deploy_packaging` flow deploys the package's metadata to the packaging org.

The `ci_master` flow includes the `deploy_packaging` flow, but also takes care of:

1. Updating any dependencies in the packaging org
2. Deploying any unpackaged Metadata under `unpackaged/pre`
3. Sets up the System Administrator profile with full FLS permissions on all objects/fields.

## Deploy to a Production Org

Deployments to a Production org environment will typically want to utilize either the `deploy_unmanaged` flow or the `deploy` task.

In most cases, `deploy_unmanaged` will have the desired outcome. This will deploy metadata, but also unschedule Scheduled Apex and uninstall previously-deployed components that have been removed from the source repository. If you do not want incremental component removal or Apex unscheduling, use the `deploy` task.

## Build Managed Package Versions

Once new metadata has been added to the packaging org, it is often desirable to create a new beta version for your managed package so that it can be tested. We can use the `release_beta` flow to accomplish this. The following shows a snippet from the `main` <<https://github.com/SFDO-Tooling/CumulusCI-CI-Demo/blob/main/.github/workflows/main.yml>> workflow in our demo repository.

```
name: Beta Package and Install

on:
  push:
    branches:
      - master
    paths-ignore:
      - 'docs/**'
      - 'README.md'

env:
  CUMULUSCI_SERVICE_github: ${ secrets.CUMULUSCI_SERVICE_github }
  CUMULUSCI_ORG_packaging: '{"username": "d.reed@cci-ci-demo.package", "instance_url":
↪ "https://cumulusci-ci-demo-dev-ed.my.salesforce.com"}'
  SFDX_CLIENT_ID: ${ secrets.SFDX_CLIENT_ID }
  SFDX_HUB_KEY: ${ secrets.SFDX_HUB_KEY }

release_beta:
  name: "Upload Managed Beta"
  runs-on: ubuntu-latest
  needs: deploy_packaging
  steps:
    - uses: actions/checkout@v2
    - name: Install Salesforce CLI
      run: |
        mkdir sfdx
        wget -qO- https://developer.salesforce.com/media/salesforce-cli/sfdx/channels/
↪ stable/sfdx-linux-x64.tar.xz | tar xJ -C sfdx --strip-components 1
        echo $(realpath sfdx/bin) >> $GITHUB_PATH
    - name: Authenticate Dev Hub
      run: |
        echo ${ secrets.SFDX_AUTH_URL } > sfdx_auth
        sfdx force:auth:sfdxurl:store -f sfdx_auth -d
    - name: Set up Python
      uses: actions/setup-python@v1
      with:
        python-version: "3.8"
    - name: Install CumulusCI
      run: |
        python -m pip install -U pip
        pip install cumulusci
    - run: |
        cci flow run release_beta --org packaging
```

After installing `sfdx`, Python, and CumulusCI, the workflow executes the `release_beta` flow against the `packaging` org. This flow does several things:

- Uploads a new Beta Version of the package in the `packaging` org
- Creates a GitHub release for the beta version
- Generates sample release notes for the beta version
- Merges the latest commit on the main branch into all open feature branches



---

**Important:** CumulusCI is able to connect to the packaging org via CUMULUSCI\_ORG\_packaging environment variable defined at the [top of the workflow](#).

---

## References

- [GitHub Actions Documentation](#)



## RELEASE MANAGED AND UNLOCKED PACKAGES

CumulusCI makes it easy to build first- and second-generation managed packages, as well as unlocked packages. While the overall workflows for all types of packages are quite similar, there are key differences between them. The chapters below explore all three packaging options.

New projects should, absent any other considerations, generally choose to use second-generation managed packages or unlocked packages. Learn more about second-generation packaging and its advantages in the [Salesforce DX Developer Guide](#).

### 12.1 Release a First-Generation Managed Package

This section outlines how to release first-generation (1GP) Salesforce managed package projects. Salesforce.org's Release Engineering team practices *CumulusCI Flow*, which incorporates all of these steps.

#### 12.1.1 Prerequisites

This section assumes:

- *CumulusCI is installed* on your computer.
- A Salesforce managed package *project has been configured* for use with CumulusCI.
- A packaging org *is connected* to CumulusCI under the name of `packaging`.

To verify this setup and display information about the connected packaging org:

```
$ cci org info packaging
```

---

**Note:** The packaging org can be listed under an alias. For a complete list of orgs connected to CumulusCI, run `cci org list`.

---

If your project has been configured for use with CumulusCI, `cci org info` lists the project's namespace under `package__namespace` in the output.

## Create a Managed Package Project

If you haven't created a managed package project, follow these steps:

- Create a Developer Edition Org. ([Sign up for one here.](#))
- [Create a managed package.](#)
- [Assign a namespace.](#)
- Configure the namespace in CumulusCI.

### 12.1.2 Deploy to a Packaging Org

CumulusCI deploys metadata to a packaging org with the `ci_master` flow.

**Warning:** The `ci_master` flow runs the `uninstall_packaged_incremental` task, which deletes any metadata from the package in the target org that's not in the repository.

```
$ cci flow run ci_master --org packaging
```

The `ci_master` flow executes these tasks in the target org.

- Updates any project dependencies
- Deploys any unpackaged metadata located in the `pre` directory
- Deploys packaged metadata
- Deploys destructive changes to remove metadata in the target org that is no longer in the local repository
- Runs the `config_packaging` flow, which by default consists only of the `update_admin_profile` task.

---

**Tip:** To list each step in the `ci_master` flow, run `cci flow info ci_master`.

---

CumulusCI separates uploading metadata to the packaging org and releasing a beta version of the package into the `ci_master` and `release_beta` flows, respectively. This separation offers discretion to run additional checks against the org, if necessary, between deploy and release steps.

### 12.1.3 Create a Beta Version

The `release_beta` flow groups the common tasks that must be executed for the release of a new beta version of a project.

```
$ cci flow run release_beta --org packaging
```

This flow *always* runs against the project's `packaging` org, where it:

- Uploads a new beta version of the managed package.
- Creates a new GitHub release tag for the new beta version. Extension packages that also use CumulusCI require this release tag to find the latest version when this repository is listed as a dependency.
- Generates Release Notes.

- Syncs feature branches with the `main` branch, which automatically integrates the latest changes from `main`. For more information see [Auto Merging](#).

---

**Important:** This flow assumes that the package contents were already deployed using the `ci_master` flow. It does *not* include a step to deploy them.

---

To create a new beta version for your project without the bells and whistles, use the `upload_beta` task:

```
$ cci task run upload_beta --org packaging --name package_version
```

### 12.1.4 Test a Beta Version

The `ci_beta` flow installs the latest beta version of the project in a scratch org, and runs Apex tests against it.

```
$ cci flow run ci_beta --org beta
```

This flow is intended to be run whenever a beta release is created.

### 12.1.5 Upload and Test a Final Version

To upload a production release of your managed package project:

```
$ cci flow run release_production --org packaging
```

Similar to `release_beta`, this task uploads a new production version of your package, creates a release tag in GitHub, and aggregates release notes for the new version.

---

**Important:** This flow assumes that the package contents have previously been deployed using the `ci_master` flow.

---

To upload the new production version without creating the GitHub tag and generating release notes:

```
$ cci task run upload_production --name v1.2.1
```

To test the new package version:

```
$ cci flow run ci_release --org release
```

The `ci_release` flow installs the latest production release version, and runs the Apex tests from the managed package on a scratch org.

## 12.2 Release a Second-Generation Managed Package

This section outlines how to release second-generation (2GP) Salesforce managed package projects. Salesforce.org's Release Engineering team practices *CumulusCI Flow*, which incorporates all of these steps.

## 12.2.1 Prerequisites

This section assumes:

- *CumulusCI is installed* on your computer.
- A Salesforce managed package project has been *configured* for use with CumulusCI.
- Your Dev Hub has the required features enabled: [Enable DevHub Features in Your Org](#) and [Enable Unlocked and Second-Generation Managed Packaging](#).
- A namespace org has been [created and linked to the active Dev Hub](#).

## 12.2.2 Create a Beta Version

CumulusCI uses the `dependencies` section of your `cumulusci.yml` file to define your 2GP project's dependencies. CumulusCI uses GitHub releases to identify the ancestor id and new version number for the beta package version. By default, the new beta version will increment the minor version number from the most recent GitHub release.

Because Salesforce requires package version Ids (`04txxxxxxxxxxx`) for 2GP package dependencies, dependencies with 1GP releases created *before CumulusCI 3.34.0* must be installed in an org to make those Ids available. If your project has such dependencies, start by running

```
$ cci flow run dependencies --org dev
```

If you are using CumulusCI 3.43.0 or later, your project uses dependencies specified as a `version_id`, 2GP dependencies, or dependencies whose releases were created by CumulusCI 3.34.0 or later, you do not need to execute this step. Current versions of CumulusCI automatically store and consume the package version Id in GitHub releases.

When you're ready, and your org is prepared, to upload a package version, run the command

```
$ cci flow run release_2gp_beta --org dev
```

---

**Important:** The org supplied to `release_2gp_beta` has two purposes. One is to look up the Ids of dependency packages (see above). The other is to provide the configuration for the *build org* used to upload the 2GP package version. CumulusCI will use the scratch org definition file used to create the specified org (`dev` here) to create the build org, which defines the features and settings available during package upload.

You may wish to define a separate scratch org configuration just for package uploads to ensure only your required features are present.

---

The `release_2gp_beta` flow executes these tasks:

- Uploads a new beta version of the managed package.
- Creates a new GitHub release tag for the new beta version. Extension packages that also use CumulusCI require this release tag to find the latest version when this repository is listed as a dependency.
- Generates Release Notes.
- Syncs feature branches with the `main` branch, which automatically integrates the latest changes from `main`. For more information see [Auto Merging](#).

---

**Tip:** To list each step in the `release_2gp_beta` flow, run `cci flow info release_2gp_beta`.

---

## Customizing Package Uploads

2GP package uploads are performed by the `create_package_version` task. If the built-in configuration used by `release_2gp_beta` does not suit the needs of your project - for example, if you want to increment version numbers differently, or build a package with the Skip Validation option - you can customize the options for that task in `release_2gp_beta` or invoke the task directly.

To learn more about the available options, run

```
$ cci task info create_package_version
```

## Handling Unpackaged Metadata

CumulusCI projects can include *unpackaged metadata* in directories like `unpackaged/pre` and `unpackaged/post`. These directories are deployed when CumulusCI creates a scratch org, and are installed in the packaging org when CumulusCI creates 1GP package versions. However, second-generation packaging does not have a packaging org, and does not allow interactive access to the build org.

CumulusCI offers two modes of handling unpackaged metadata owned by dependencies when building a second-generation package.

The default behavior is to ignore unpackaged metadata. If unpackaged metadata is intended to satisfy install-time dependencies of packages, this requires that those dependencies be met in other ways, such as by configuring the scratch org definition. For examples of how to satisfy the install-time dependencies for NPSP and EDA without using unpackaged metadata, see [Extending NPSP and EDA with Second-Generation Packaging](#).

The other option is to have CumulusCI automatically create unlocked packages containing unpackaged metadata from dependency projects. For example, if your project depended on the repository Food-Bank, which contained the unpackaged metadata directories

- `unpackaged/pre/record_types`
- `unpackaged/pre/setup`

CumulusCI would automatically, while uploading a version of your package, upload unlocked package versions containing the current content of those unpackaged directories.

The unlocked package route is generally suitable for testing only, where it may be convenient when working with complex legacy projects that include lots of unpackaged metadata. However, it's generally *not* suitable for use when building production packages, because your packages would have to be distributed along with those unlocked packages. For this reason, this behavior is off by default. If you would like to use it, configure your `cumulusci.yml` to set the option `create_unlocked_dependency_packages` on the `create_package_version` task.

### 12.2.3 Test a Beta Version

The `ci_beta` flow installs the latest beta version of the project in a scratch org, and runs Apex tests against it.

```
$ cci flow run ci_beta --org beta
```

This flow is intended to be run whenever a beta release is created.

## 12.2.4 Promote a Production Version

To be installed in a production org, an 2GP package version must be **promoted** to mark it as released.

To promote a production release of your managed package project:

```
$ cci flow run release_2gp_production --org packaging
```

Unlike first-generation packages, promoting a second-generation package doesn't upload a new version. Instead, it promotes the most recent beta version (found in the project's GitHub releases) to production status. Then, CumulusCI creates a new, production GitHub release, and aggregates release notes for that release.

You can also promote a package using its 04t package Id, without using the GitHub release operations:

```
$ cci task run promote_package_version --version_id 04t0000000000000 --promote_  
↪dependencies True
```

Alternatively, you can use the `sfdx force:package:version:promote` command to promote a 2GP package. Note that using this command will also not perform any release operations in GitHub.

### Promote Dependencies

If additional unlocked packages were created to hold unpackaged dependencies, they must be promoted as well. To promote dependencies automatically use `--promote_dependencies True` with the `promote_package_version` task, or customize the `release_2gp_production` flow to include that option.

```
$ cci task run promote_package_version --version_id 04t0000000000000 --promote_  
↪dependencies True
```

## 12.2.5 Test a Production Version

To test the new package version:

```
$ cci flow run ci_release --org release
```

The `ci_release` flow installs the latest production release version and runs the Apex tests from the managed package on a scratch org.

## 12.3 Release an Unlocked Package

While CumulusCI was originally created to develop managed packages, it can also be used to develop and release **unlocked packages**.



### 12.3.1 Prerequisites

This section assumes:

- *CumulusCI* is *installed* on your computer.
- A Salesforce project has been *configured* for use with CumulusCI.
- Your Dev Hub has the required features enabled: [Enable DevHub Features in Your Org](#) and [Enable Unlocked and Second-Generation Managed Packaging](#).
- If you're building a namespaced unlocked package, a namespace org has been *created and linked to the active Dev Hub*.

### 12.3.2 Create a Beta Version

CumulusCI uses the `dependencies` section of your `cumulusci.yml` file to define your 2GP project's dependencies. CumulusCI uses GitHub releases to identify the ancestor Id and new version number for the beta package version. By default, the new beta version will increment the minor version number from the most recent GitHub release.

Because Salesforce requires package version Ids (`04txxxxxxxxxxxx`) for 2GP package dependencies, some CumulusCI dependencies must be installed in an org to make those Ids available. If your project has dependencies that are not specified as a `version_id`, start by running

```
$ cci flow run dependencies --org dev
```

When you're ready, and your org is prepared, to upload a package version, run the command

```
$ cci flow run release_unlocked_beta --org dev
```

**Important:** The org supplied to `release_unlocked_beta` has two purposes. One is to look up the Ids of dependency packages (see above). The other is to provide the configuration for the *build org* used to upload the 2GP package version. CumulusCI will use the scratch org definition file used to create the specified org (`dev` here) to create the build org, which defines the features and settings available during package upload.

You may wish to define a separate scratch org configuration (`build`) just for package uploads to ensure only your required features are present.

The `release_unlocked_beta` flow executes these tasks:

- Uploads a new beta version of the unlocked package.
- Creates a new GitHub release tag for the new beta version. Extension packages that also use CumulusCI require this release tag to find the latest version when this repository is listed as a dependency.
- Generates Release Notes.
- Syncs feature branches with the `main` branch, which automatically integrates the latest changes from `main`. For more information see [Auto Merging](#).

**Tip:** To list each step in the `release_unlocked_beta` flow, run `cci flow info release_unlocked_beta`.

## Customizing Package Uploads

2GP package uploads are performed by the `create_package_version` task. If the built-in configuration used by `release_unlocked_beta` does not suit the needs of your project - for example, if you want to increment version numbers differently, or build an org-dependent package - you can customize the options for that task in `release_unlocked_beta` or invoke the task directly.

To learn more about the available options, run

```
$ cci task info create_package_version
```

CumulusCI can also create org-dependent and skip-validation packages when configured with the appropriate options.

## Handling Unpackaged Metadata

CumulusCI projects can include *unpackaged metadata* in directories like `unpackaged/pre` and `unpackaged/post`. These directories are deployed when CumulusCI creates a scratch org, and are installed in the packaging org when CumulusCI creates 1GP package versions. However, second-generation packaging does not have a packaging org, and does not allow interactive access to the build org.

CumulusCI offers two modes of handling unpackaged metadata owned by dependencies when building a second-generation package.

The default behavior is to ignore unpackaged metadata. If unpackaged metadata is intended to satisfy install-time dependencies of packages, this requires that those dependencies be met in other ways, such as by configuring the scratch org definition. For examples of how to satisfy the install-time dependencies for NPSP and EDA without using unpackaged metadata, see [Extending NPSP and EDA with Second-Generation Packaging](#).

The other option is to have CumulusCI automatically create unlocked packages containing unpackaged metadata from dependency projects. For example, if your project depended on the repository Food-Bank, which contained the unpackaged metadata directories

- `unpackaged/pre/record_types`
- `unpackaged/pre/setup`

CumulusCI would automatically, while uploading a version of your package, upload unlocked package versions containing the current content of those unpackaged directories.

The unlocked package route is generally suitable for testing only, where it may be convenient when working with complex legacy projects that include lots of unpackaged metadata. However, it's generally *not* suitable for use when building production packages, because your packages would have to be distributed along with those unlocked packages. For this reason, this behavior is off by default. If you would like to use it, configure your `cumulusci.yml` to set the option `create_unlocked_dependency_packages` on the `create_package_version` task.

### 12.3.3 Test a Beta Version

The `ci_beta` flow installs the latest beta version of the project in a scratch org, and runs Apex tests against it.

```
$ cci flow run ci_beta --org beta
```

This flow is intended to be run whenever a beta release is created.

### 12.3.4 Promote a Production Version

To be installed in a production org, an 2GP package version must be **promoted** to mark it as released.

To promote a production release of your managed package project:

```
$ cci flow run release_unlocked_production --org packaging
```

Unlike first-generation packages, promoting a second-generation package doesn't upload a new version. Instead, it promotes the most recent beta version (found in the project's GitHub releases) to production status. Then, CumulusCI creates a new, production GitHub release, and aggregates release notes for that release.

You can also promote a package using its 04t package Id, without using the GitHub release operations:

```
$ cci task run promote_package_version --version_id 04t0000000000000000 --promote_
  ↳dependencies True
```

Alternatively, you can use the `sfdx force:package:version:promote` command to promote a 2GP package.

#### Promote Dependencies

If additional unlocked packages were created to hold unpackaged dependencies, they must be promoted as well. To promote dependencies automatically use `--promote_dependencies True` with the `promote_package_version` task, or customize the `release_unlocked_production` flow to include that option.

```
$ cci task run promote_package_version --version_id 04t0000000000000000 --promote_
  ↳dependencies True
```

### 12.3.5 Test a Production Version

To test the new package version:

```
$ cci flow run ci_release --org release
```

The `ci_release` flow installs the latest production release version and runs the Apex tests from the managed package on a scratch org.

## 12.4 Extend NPSP and EDA with Second-Generation Packaging

Building packages that extend (depend on) NPSP and EDA using second-generation packaging involves some unique complications. Both NPSP and EDA have install-time dependencies on Record Type org features: an Account Record Type must exist in order for the packages to install.

When building first-generation packages, both NPSP and EDA serve this need by installing unpackaged Record Types stored in their `unpackaged/pre` folders. However, second-generation packaging doesn't allow interactive access to its build orgs, where package versions are created.

We recommend that projects which extend EDA or NPSP with a second-generation package use scratch org definition files to satisfy these Record Type dependencies. You can do this by creating a new org definition file in `orgs`, based on your existing org definitions, and adding to it an `objectSettings` section. We'll call this file `orgs/build.json`.

```
"settings": {
  /* Your project's settings are here */
},
"objectSettings": {
  "account": {
    "defaultRecordType": "default"
  }
}
```

You'll also add to your *cumulusci.yml*:

```
orgs:
  scratch:
    build:
      config_file: orgs/build.json
```

Then, run your 2GP builds against the org *build*:

```
$ cci flow run dependencies --org build
$ cci flow run release_2gp_beta --org build
```

This will result in the creation of default Record Types in the build org, allowing NPSP to be installed. Meanwhile, your other scratch orgs will continue to use the NPSP or EDA default Record Types, installed by CumulusCI's dependency-management system and reflecting the configuration of the subscriber orgs into which your package will ultimately be installed.

## 12.5 Generate Release Notes

The `github_release_notes` task fetches the text from Pull Requests that were merged between two given tags. The task then searches for specific titles (Critical Changes, Changes, Issues Closed, New Metadata, Installation Info, and so on) in the Pull Request bodies, and aggregates the text together under those titles in the GitHub tag description.

`github_release_notes` is automatically run during CumulusCI's built-in release flows.

To see what the release notes look like without publishing them to GitHub:

```
$ cci task run github_release_notes --tag release/1.2
```

---

**Note:** The `--tag` option indicates which release's change notes are aggregated. The previous command aggregates all change notes between the *1.2* release and the *1.1* release.

---

To see where each line in the release notes comes from, use the `--link_pr True` option.

```
$ cci task run github_release_notes --tag release/1.2 --link_pr True
```

To publish the release notes to a release tag in GitHub, use the `--publish True` option:

```
$ cci task run github_release_notes --tag release/1.2 --publish True
```

To use additional headings, add new ones (as parsers) under the `project__git__release_notes` section of the *cumulusci.yml* file.

```
release_notes:
  parsers:
    7: class_path: cumulusci.tasks.release_notes.parser.GithubLinesParser
```

**Note:** The new parser is listed with the number 7 because the first six are the [default parsers](#) that come with CumulusCI.

## 12.6 Manage Push Upgrades

If your packaging org (for first-generation packages) or Dev Hub (for second-generation packages) is enabled to use push upgrades, CumulusCI can schedule push upgrades with the `push_sandbox` and `push_all` tasks.

**Warning:** `push_all` schedules push upgrades to *all* customers' production and sandbox orgs. Please confirm that this action is desired before executing the task.

```
$ cci task run push_all --version <version> --org packaging
```

Replace `<version>` with the version of the managed package to be pushed.

By default, push upgrades are scheduled to run immediately.

To schedule the push upgrades to occur at a specific time, use the `--start_time` option with a time value in UTC.

```
$ cci task run push_all --version <version> --start_time 2020-10-19T10:00 --org packaging
```

There are additional tasks related to push upgrades in the CumulusCI standard library.

- `push_failure_report`: Produces a csv report of the failed and otherwise anomalous push jobs.
- `push_list`: Schedules a push upgrade of a package version to all orgs listed in a specified file.
- `push_qa`: Schedules a push upgrade of a package version to all orgs listed in `push/orgs_qa.txt`.
- `push_sandbox`: Schedules a push upgrade of a package version to all subscribers' sandboxes.
- `push_trial`: Schedules a push upgrade of a package version to Salesforce Template orgs listed in `push/orgs_trial.txt`.



## MANAGE UNPACKAGED CONFIGURATION

Not everything that's part of an application can be part of a package.

CumulusCI implements the Product Delivery Model by offering support for complex applications – applications that may include multiple managed packages as well as unpackaged metadata, and setup automation that configures org settings or makes precise changes to existing configuration.

The tools used to implement that support are *unpackaged metadata* and *Metadata ETL*.

Unpackaged metadata refers to metadata that is not delivered as part of a package, and can include both support metadata delivered to users as well as metadata that operationally configures orgs used by the product.

Metadata ETL is a suite of tasks that supports surgically altering existing metadata in an org. It's a powerful technique that alters the unpackaged configuration in an org without risking damage to existing customizations by overwriting them with incoming metadata. Metadata ETL is relevant for delivering applications to customers safely, and is often a superior alternative to unpackaged metadata.

To learn more, see [Metadata ETL](#).

### 13.1 Roles of Unpackaged Metadata

#### 13.1.1 unpackaged/pre: Prepare an Org

Some projects require that unpackaged metadata be deployed to finish the customization of an org *before* the package's own code and metadata are deployed.

For example, the [Nonprofit Success Pack \(NPSP\)](#) must deploy unpackaged Record Types prior to installing its own packages. `unpackaged/pre` is the location designed for such metadata, which is stored in subdirectories such as `unpackaged/pre/first`.

CumulusCI's standard flows that build orgs, such as `dev_org` and `install_prod`, always deploy metadata bundles found in `unpackaged/pre` before proceeding to the deployment of the application. It's also easy to include `unpackaged/pre` metadata in customer-facing installers run via MetaDeploy.

The `deploy_pre` task, which is part of the `dependencies` flow, is responsible for deploying these bundles.

---

**Important:** Do not include metadata in `unpackaged/pre` unless it is intended to be delivered to *all* installations of the product.

---

### 13.1.2 unpackaged/post: Configuration After Package Install

Projects often include metadata that is genuinely part of the application, but cannot be delivered as part of a managed package for operational reasons. This metadata must be deployed *after* the package's own code and metadata are deployed first and the org is configured.

For example, a product can't deliver TopicsForObjects metadata as part of a managed package because that type of metadata isn't packageable. `unpackaged/post` is the home for this kind of metadata, which is stored in subdirectories such as `unpackaged/post/first`.

---

**Note:** To learn more about which components are packageable, see the [Metadata Coverage Report](#).

---

CumulusCI's standard flows that build orgs, such as `dev_org` and `install_prod`, always deploy metadata bundles found in `unpackaged/post`, making it a full-fledged part of the application. It's also easy to include `unpackaged/post` metadata in customer-facing installers run via `MetaDeploy`.

The `deploy_post` task, which is part of the `config_dev`, `config_qa`, and `config_managed` flows, is responsible for deploying these bundles.

---

**Important:** Do not include metadata in `unpackaged/post` unless it is intended to be delivered to *all* environments (both managed installations and unmanaged deployments). It's also critical for managed package projects that this metadata include namespace tokens (see [namespace injection](#)).

---

### 13.1.3 unpackaged/config: Tailor an Org

Projects can come with more than one supported configuration in their CumulusCI automation. For example, projects often support distinct, tailored `dev_org`, `qa_org`, and `install_prod` flows, each of which performs a unique setup for their specific use case.

Unpackaged metadata stored in `unpackaged/config` is a tool to support operational needs that tailor orgs to different configurations. For instance, a testing-oriented scratch org may need to deploy a customized set of Page Layouts to help testers easily visualize data under test. Such page layouts are stored in `unpackaged/config/qa`.

## 13.2 Unpackaged Metadata Folder Structure

All unpackaged metadata is stored in the `unpackaged` directory tree, which contains these top-level directories.

- `unpackaged/pre`
- `unpackaged/post`
- `unpackaged/config`

These trees contain metadata bundles in Metadata API or Salesforce DX format. CumulusCI automatically converts Salesforce DX-format unpackaged bundles to Metadata API format before deploying them.



## 13.3 Namespace Injection

Projects that build managed packages often construct their unpackaged metadata to be deployable in multiple contexts, such as:

- Unmanaged deployments, such as developer orgs.
- Unmanaged namespaced scratch orgs.
- Managed contexts, such as a beta test org or a demo org created with `install_prod`.

For example, metadata located in `unpackaged/post` is deployed after the application code in both unmanaged and managed contexts. If that metadata contains references to the application components, it must be deployable when that metadata is namespaced (in a managed context or namespaced scratch org) *and* when it is not (in an unmanaged context).

CumulusCI uses a strategy called *namespace injection* to support this use case. Namespace injection is very powerful, and requires care from the project team to ensure that metadata remains deployable in all contexts.

---

**Important:** Projects that are building an org implementation or a non-namespaced package do not have a namespace, or a distinction between managed and unmanaged contexts. These projects typically don't need to use namespace injection.

---

Metadata files where a namespace is conditionally applied to components for insertion into different contexts must replace the namespace with a *token*, which CumulusCI replaces with the appropriate value or with an empty string as appropriate to the context.

- `%%NAMESPACE%%` is replaced with the package's namespace in any context with a namespace (such as a namespaced org or managed org). Otherwise, it remains blank.
- **`%%NAMESPACED_ORG%%` is replaced with the package's namespace in a namespaced org *only*, not in a managed installation.**

---

**Note:** This token supports use cases where components in one unpackaged metadata bundle refer to components in another, and the dependency bundle acquires a namespace by being deployed into a namespaced org.

---

- `%%NAMESPACE_OR_C%%` is replaced with the package's namespace in any context with a namespace (such as a namespaced org or managed org). Otherwise, it is replaced with `c`, the generic namespace used in Lightning components.
- `%%NAMESPACED_ORG_OR_C%%` is replaced with the package's namespace in a namespaced org *only*, not in a managed installation. Otherwise, it is replaced with `c`, the generic namespace used in Lightning components.
- **`%%NAMESPACE_DOT%%` is replaced with the package's namespace in any context with a namespace (such as a namespaced org).**

---

**Note:** This token is used to construct references to packaged Record Types and Apex classes.

---

An example case for namespace injection can be found in Salesforce.org's [Nonprofit Success Pack \(NPSP\)](#) managed package. A portion of metadata from NPSP is stored in a subdirectory under `unpackaged/post`, meaning it's deployed after the application metadata. This metadata updates a Compact Layout on the `Account` object, and references packaged metadata from the application as well as from other managed packages. To deploy this as a managed context, this metadata requires the use of namespace tokens to represent the `npssp` namespace, letting CumulusCI automatically adapt the metadata to deploy into managed and unmanaged contexts.

```
<?xml version="1.0" encoding="UTF-8"?>
<CustomObject xmlns="http://soap.sforce.com/2006/04/metadata">
  <compactLayouts>
    <fullName>NPSP_Household_Account</fullName>
    <fields>Name</fields>
    <fields>npo02__TotalOppAmount__c</fields>
    <fields>%%NAMESPACE%%Number_of_Household_Members__c</fields>
    <label>NPSP Household Account</label>
  </compactLayouts>
</CustomObject>
```

Note that only the reference to the NPSP field `Number_of_Household_Members__c` is tokenized. (When installed as part of the managed package, this field appears as `npsp__Number_of_Household_Members__c`.) References to NPSP's own managed package dependency, `npo02`, are not tokenized because this metadata is always namespaced when installed.

If this metadata isn't tokenized, it fails to deploy into an org containing NPSP as a beta or released managed package (because in that context the field `Number_of_Household_Members__c` is namespaced as `npsp__Number_of_Household_Members__c`, and must be referred to as such).

---

**Note:** The resolution of component references in namespaced scratch orgs and in managed installations of the same metadata are not identical. Metadata that is tokenized and deploys cleanly in a namespaced scratch org can still fail in a managed context.

---

### 13.3.1 Configuration

Most CumulusCI tasks can intelligently determine whether or not to inject the namespace based on the target org. For example, if tokenized metadata is being deployed into an org that contains the project installed as a managed package, CumulusCI knows to inject the namespace; otherwise, it replaces namespace tokens with an empty string for an unmanaged installation.

You can also specify explicit configuration for namespace injection in circumstances where CumulusCI's automatic functionality does not meet your needs, such as when deploying tokenized metadata from another project. If the metadata you are deploying has been tokenized, and you want to deploy metadata with a namespace, use the `namespace_inject`: `<namespace>` option to inject the namespace.

```
project:
  dependencies:
    - zip_url: https://github.com/SalesforceFoundation/EDA/archive/master.zip
      subfolder: EDA-master/dev_config/src/admin_config
      namespace_inject: hed
```

The metadata in the zip contains the string tokens `%%NAMESPACE%%` and `___NAMESPACE___` which is replaced with `hed__` before the metadata is deployed.

To deploy tokenized metadata without any namespace references, specify both `namespace_inject`: `<namespace>` and `unmanaged`: `True`. In this example, we do just this for the EDA dependency.

```
project:
  dependencies:
    - zip_url: https://github.com/SalesforceFoundation/EDA/archive/master.zip
      subfolder: EDA-master/dev_config/src/admin_config
```

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```
namespace_inject: hed
unmanaged: True
```

The namespace tokens are replaced with an empty string instead of the namespace, effectively stripping the tokens from the files and filenames.

## 13.4 Retrieve Unpackaged Metadata

CumulusCI provides tasks to *Retrieve Changes* to unpackaged metadata, just as with packaged metadata.

When working with unpackaged metadata, it's important to maintain awareness of key considerations related to retrieving metadata that is not part of the main application.

- Take care to separate your development between the different bundles you wish to retrieve. For example, if you have changes to make in the application as well as in unpackaged metadata, complete the application changes first, retrieve them, and then make the unpackaged changes and retrieve those. If you conflate changes to components that live in separate elements of your project, it's difficult to untangle them.
- Whenever possible, build your unpackaged metadata in an org that contains a beta or released managed package. By doing so, the metadata contains namespaces when extracted, which CumulusCI easily replaces with tokens when retrieving metadata. It's difficult to manually tokenize metadata that's retrieved from an unmanaged org without namespaces.

After building changes to unpackaged metadata in a managed org, retrieve it using the `retrieve_changes` task with the additional `namespace_tokenize` option, and use the `path` option to direct the retrieved metadata to your desired unpackaged directory.

In the following example, we run the `retrieve_changes` task to retrieve metadata changes into the `unpackaged/config/qa` subdirectory, and replace references to the namespace `npdp` with the appropriate token.

```
$ cci task run retrieve_changes --path unpackaged/config/qa --namespace_tokenize npdp
```

Projects that use unpackaged metadata extensively define retrieve tasks to streamline this process.

For example, here is a custom task that retrieves changes to specific directory where metadata for QA configuration is kept.

```
retrieve_qa_config:
  description: Retrieves changes to QA configuration metadata
  class_path: cumulusci.tasks.salesforce.sourcetracking.RetrieveChanges
  options:
    path: unpackaged/config/qa
    namespace_tokenize: $project_config.project__package__namespace
```

The `retrieve_changes` task retrieves unpackaged metadata in a managed org, but in this case you must manually insert namespace tokens to deploy metadata in a managed or namespaced context.

## 13.5 Customize Config Flows

Projects often customize new tasks that deploy unpackaged/config bundles, and harness these tasks in flows.

Projects that use unpackaged/config/qa often define a `deploy_qa_config` task.

```
deploy_qa_config:
  description: Deploys additional fields used for QA purposes only
  class_path: cumulusci.tasks.salesforce.Deploy
  options:
    path: unpackaged/config/qa
```

This task is then added to relevant flows, such as `config_qa`.

```
config_qa:
  steps:
    3:
      task: deploy_qa_config
```

In most cases, CumulusCI intelligently determines whether or not to inject the namespace. It's rarely necessary to explicitly configure an injection mode. If you need to do so, use the `unmanaged` option:

```
config_regression:
  steps:
    3:
      task: deploy_qa_config
      options:
        unmanaged: False
```

For more details on customizing tasks and flows, see the [configure CumulusCI](#) section.

## METADATA ETL

### 14.1 Introduction to Metadata ETL

“ETL” refers to “extract, transform, and load” operations, usually applied to data. CumulusCI offers a suite of functionality we call *Metadata ETL*. Metadata ETL makes it easy to define automation that executes targeted transformations of metadata that already exists in an org.

Metadata ETL is particularly useful for building automation in projects that extend other managed packages or that perform complex setup operations during installations, such as through MetaDeploy. By using Metadata ETL tasks, projects can often avoid storing and deploying unpackaged metadata by instead extracting metadata from the target org, making changes, and then re-deploying. This mode of configuration is lower-risk and lower-maintenance than storing extensive unpackaged metadata, which may become out-of-sync, incur accidental feature dependencies, or entail more destructive deployment operations.

A primary example use case for Metadata ETL is deployment of Standard Value Sets. Standard Value Sets, which define the picklist values available on standard fields like `Opportunity.StageName`, are not packageable, and as such must be part of an application’s unpackaged metadata. They’re critical to many applications: a Business Process, for example, will fail to deploy if the Stage values it includes are not available. And lastly, they come with a serious danger for deployment into subscriber orgs: deploying Standard Value Sets is an overwrite operation, so all existing values in the target org that aren’t part of the deployment are deactivated. This means that it’s neither safe nor maintainable to store static Standard Value Set metadata in a project and deploy it.

These three facets - non-packageability, application requirements, and deployment safety - all support a Metadata ETL approach. Rather than attempting to deploy static metadata stored in the repository, the product’s automation should *extract* the Standard Value Set metadata from the org, *transform* it to include the desired values (as well as all existing customization), and *load* the transformed metadata back into the org. CumulusCI now ships with a task, `add_standard_value_set_entries`, that makes it easy to do just this:

```
add_standard_value_set_entries:
  options:
    entries:
      - fullName: "New_Value"
        label: "New Value"
        closed: False
    api_names:
      - CaseStatus
```

This task would retrieve the existing `Case.Status` picklist value set from the org, add the `New_Value` entry to it, and redeploy the modified metadata - ensuring that the application’s needs are met with a safe, minimal intervention in the target org.

## 14.2 Standard Metadata ETL Tasks

CumulusCI includes several Metadata ETL tasks in its standard library. For information about all of the available tasks, see `cci task list` for tasks in the group Metadata Transformations.

Most Metadata ETL tasks accept the option `api_names`, which specifies the developer names of the specific metadata components which should be included in the operation. In most cases, more than one entity may be transformed in a single operation. Each task performs a single Metadata API retrieve and a single atomic deployment. Please note, however, that the extract-transform-load operation as a whole is *not* atomic; it is not safe to run Metadata ETL tasks in parallel or to mutate metadata by other means during the run of a Metadata ETL task.

Consult the Task Reference or use the `cci task info` command for more information on the usage of each task.

The Metadata ETL framework makes it easy to add more tasks. For information about implementing Metadata ETL tasks, see TODO: link to section in Python customization.

## 14.3 Namespace Injection

All out-of-the-box Metadata ETL tasks accept a Boolean `managed` option. If `True`, CumulusCI will replace the token `%%NAMESPACE%%` in API names and in values used for transforming metadata with the project's namespace; if `False`, the token will simply be removed. See *Namespace Injection* for more information.

## 14.4 Implementation of Metadata ETL Tasks

This section covers internals of the Metadata ETL framework, and is intended for users who wish to build their own Metadata ETL tasks.

The Metadata ETL framework, and out-of-the-box Metadata ETL tasks, are part of the `cumulusci.tasks.metadata_etl` package. The `cumulusci.tasks.metadata_etl.base` module contains all of the base classes inherited by Metadata ETL classes.

The easiest way to implement a Metadata ETL class that extracts, transforms, and loads a specific entity, such as `CustomObject` or `Layout`, is to subclass `MetadataSingleEntityTransformTask`.

This abstract base class has two override points: the class attribute `entity` should be defined to the Metadata API entity that this class is intended to transform, and the method `_transform_entity(self, metadata: MetadataElement, api_name: str)` must be overridden. This method should make any desired changes to the supplied `MetadataElement`, and either return a `MetadataElement` for deployment, or `None` to suppress deployment of this entity. Classes may also opt to include their own options in `task_options`, but generally should also incorporate the base class's options, and override `_init_options()` (super's implementation should also be called to ensure that supplied API names are processed appropriately).

The `SetDuplicateRuleStatus` class is a simple example of implementing a `MetadataSingleEntityTransformTask` subclass, presented here with additional comments:

```
from typing import Optional

from cumulusci.tasks.metadata_etl import MetadataSingleEntityTransformTask
from cumulusci.utils.xml.metadata_tree import MetadataElement
from cumulusci.core.utils import process_bool_arg

class SetDuplicateRuleStatus(MetadataSingleEntityTransformTask):
```

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```

# Subclasses *must* define `entity`
entity = "DuplicateRule"

# Most subclasses include the base class's options via
# **MetadataSingleEntityTransformTask.task_options. Further
# options may be added for this specific task. The base class
# options include in particular the standard `api_names` option,
# which base class functionality requires.
task_options = {
    "active": {
        "description": "Boolean value, set the Duplicate Rule to either active or
↪inactive",
        "required": True,
    },
    **MetadataSingleEntityTransformTask.task_options,
}

# The `_transform_entity()` method must be overridden.
def _transform_entity(
    self, metadata: MetadataElement, api_name: str
) -> Optional[MetadataElement]:
    # This method modifies the supplied `MetadataElement`, using methods
    # from CumulusCI's metadata_tree module, to match the desired configuration.
    status = "true" if process_bool_arg(self.options["active"]) else "false"
    metadata.find("isActive").text = status

    # Always return the modified `MetadataElement` if deployment is desired.
    # To not deploy this element, return `None`.
    return metadata

```

### 14.4.1 Advanced Metadata ETL Base Classes

Most Metadata ETL tasks subclass `MetadataSingleEntityTransformTask`. However, the framework also includes classes that provide more flexibility for complex metadata transformation and synthesis operations.

The most general base class available is `BaseMetadataETLTask`. Concrete tasks should rarely subclass `BaseMetadataETLTask`. Doing so requires you to generate `package.xml` content manually by overriding `_get_package_xml_content()`, and requires you to override `_transform()`, which directly accesses retrieved metadata files on disk in `self.retrieve_dir` and places transformed versions into `self.deploy_dir`. Subclasses must also set the Boolean class attributes `deploy` and `retrieve` to define the desired mode of operation.

Tasks which wish to *synthesize* metadata, without doing a retrieval, should subclass `BaseMetadataSynthesisTask`. Subclasses must override `_synthesize()` to generate metadata files in `self.deploy_dir`. The framework will automatically create a `package.xml` and perform a deployment.

`BaseMetadataTransformTask` can be used as the base class for ETL tasks that require more flexibility than is permitted by `MetadataSingleEntityTransformTask`, such as tasks that must mutate multiple Metadata API entities in a single operation. Subclasses must override `_get_entities()` to return a dict mapping Metadata API entities to collections of API names. (The base class will generate a corresponding `package.xml`). Subclasses must also implement `_transform()`, as with `BaseMetadataETLTask`.

`UpdateFirstAttributeTextTask` is a base class and generic concrete task that makes it easy to perform a specific, common transformation: setting the value of the first instance of a specific top-level tag in a given metadata entity.

Subclasses (or tasks defined in `cumulusci.yml`) must define the `entity`, targeted `attribute`, and desired `value` to set. Example:

```
assign_account_compact_layout:
  description: "Assigns the Fancy Compact Layout as Account's Compact Layout."
  class_path: cumulusci.tasks.metadata_etl.UpdateFirstAttributeTextTask
  options:
    managed: False
    namespace_inject: $project_config.project__package__namespace
    entity: CustomObject
    api_names: Account
    attribute: compactLayoutAssignment
    value: "%%NAMESPACE%%Fancy_Account_Compact_Layout"
```



## REFERENCE

### 15.1 Cheat Sheet

CumulusCI offers a great deal of functionality out of the box. This cheat sheet is intended to provide a very brief summary of the most important commands to start working in scratch orgs using CumulusCI, using the basic flows and tasks supplied with the tool.

#### 15.1.1 Naming and Manipulating Orgs

CumulusCI supplies a collection of named org configurations by default. To see what org configurations are available, run `cci org list`. You can provide those names to any of the commands in this guide. Common examples include `dev`, `qa`, `beta`, and `release`. Org names are associated with a scratch org definition file stored in the project's `orgs` directory. The definition file determines how the scratch org is set up.

It's not necessary to name your own orgs, but you may choose to do so if, for example, you'd like to maintain multiple orgs of the same type.

##### Name a new scratch org

```
$ cci org scratch <configuration_name> <org_name>
```

This creates a new named org that inherits its setup from the configuration name provided.

##### Get information about a scratch org

```
$ cci org info <org_name>
```

This includes information like the org's domain, username, and password

### Open a scratch org in your web browser

```
$ cci org browser <org_name>
```

### Set a default scratch org

```
$ cci org default <org_name>
```

This asks CumulusCI to run all flows and tasks against the named org unless otherwise specified. You don't have to specify a default org. You can always direct CumulusCI to use a specific org with the `--org` option when you run a flow or a task.

### Delete a scratch org, but leave the org name

```
$ cci org scratch_delete <org_name>
```

Run this command to delete a scratch org so that you can rebuild it, while using the same name.

### Remove an org name

```
$ cci org remove <org_name>
```

Note that you will not be able to remove built-in org names, but you can remove names you created with `cci org scratch`.

### Connect to a persistent org (sandbox, Developer Edition)

```
$ cci org connect <org_name>
```

Use the `--sandbox` option if this is a sandbox, or any org that uses the `test.salesforce.com` login endpoint.

## 15.1.2 Building Orgs

Every CumulusCI project includes one or more flows that build an org for a specific purpose or workflow. These flows may be customized for the project, or may be unique to the project. Below are a collection of the standard org building flows that you should expect to find in any CumulusCI project.

---

**Note:** This section relies on concepts introduced in the *Key Concepts* section of the documentation.

---

---

**Note:** Each flow should be run against a named org configuration using the `--org` option, or allowed to run against a configured default org.

---

## Flows for Building Orgs

### qa\_org

This flow builds an unmanaged org that is designed for QA use. Should be used with an org whose configuration is `qa`.

### dev\_org

This flow builds an unmanaged org that is designed for development use. Should be used with an org whose configuration is `dev` or `dev_namespaced`

### install\_beta

This flow builds a managed org with the latest beta release installed. Should be used with an org whose configuration is `beta`

### install\_prod

This flow builds a managed org with the latest release installed. Should be used with an org whose configuration is `release`

### regression\_org

This flow builds a managed org that starts with the latest release installed and is then upgraded to the latest beta to simulate a subscriber upgrade. Should be used with an org whose configuration is `release`

Your project may provide additional org-building flows. Consult the project's automation documentation for more details.

**Caution:** We do not recommend running an org-building flow against the same scratch org multiple times. While this may work in some situations, in many cases it will fail and/or leave the org in an inconsistent state. If you need to rebuild an org, delete it first. If you need to redeploy updated code into an org, see below.

## 15.1.3 Common Tasks

---

**Note:** Note that each task should be run against a named org configuration using the `--org` option. If not specified, the task will run against a configured default org.

---

### Deploy updated code into an org

```
$ cci flow run deploy_unmanaged
```

### Execute Apex unit tests in an org

```
$ cci task run run_tests
```

### Execute Robot browser tests

```
$ cci task run robot
```

### Review changes to metadata in an org

```
$ cci task run list_changes
```

### Retrieve changes to local repository

```
$ cci task run retrieve_changes
```

## 15.2 Tasks Reference

### 15.2.1 activate\_flow

**Description:** Activates Flows identified by a given list of Developer Names

**Class:** cumulusci.tasks.salesforce.activate\_flow.ActivateFlow

#### Command Syntax

```
$ cci task run activate_flow
```

#### Options

**--developer\_names DEVELOPERNAMES** *Required*

List of DeveloperNames to query in SOQL

### 15.2.2 add\_page\_layout\_related\_lists

**Description:** Adds specified Related List to one or more Page Layouts.

**Class:** cumulusci.tasks.metadata\_etl.AddRelatedLists

#### Command Syntax

```
$ cci task run add_page_layout_related_lists
```

#### Options

**--related\_list RELATEDLIST** *Required*

Name of the Related List to include

**--fields FIELDS** *Optional*

Array of field API names to include in the related list

**--exclude\_buttons EXCLUDEBUTTONS** *Optional*

Array of button names to suppress from the related list

**--custom\_buttons CUSTOMBUTTONS** *Optional*

Array of button names to add to the related list

**--api\_names APINAMES** *Optional*

List of API names of entities to affect

**--managed MANAGED** *Optional*

If False, changes namespace\_inject to replace tokens with a blank string

**--namespace\_inject NAMESPACEINJECT** *Optional*

If set, the namespace tokens in files and filenames are replaced with the namespace's prefix

Default: \$project\_config.project\_\_package\_\_namespace

**--api\_version APIVERSION** *Optional*

Metadata API version to use, if not project\_\_package\_\_api\_version.

### 15.2.3 add\_page\_layout\_fields

**Description:** Adds specified Fields or Visualforce Pages to a Page Layout.

**Class:** cumulusci.tasks.metadata\_etl.layouts.AddFieldsToPageLayout

Inserts the listed fields or Visualforce pages into page layouts specified by API name.

If the targeted item already exists, the layout metadata is not modified.

You may supply a single position option, or multiple options for both pages and fields. The first option to to be matched will be used.

Task option details:

- fields:
  - api\_name: [field API name]

- required: Boolean (default False)
- read\_only: Boolean (default False, not compatible with required)
- position: (Optional: A list of single or multiple position options.)
  - \* relative: [before | after | top | bottom]
  - \* field: [api\_name] (Use with relative: before, after)
  - \* section: [index] (Use with relative: top, bottom)
  - \* column: [first | last] (Use with relative: top, bottom)
- pages:
  - api\_name: [Visualforce Page API name]
  - height: int (Optional. Default: 200)
  - show\_label: Boolean (Optional. Default: False)
  - show\_scrollbars: Boolean (Optional. Default: False)
  - width: 0-100% (Optional. Default: 100%)
  - position: (Optional: A list of single or multiple position options.)
    - \* relative: [before | after | top | bottom]
    - \* field: [api\_name] (Use with relative: before, after)
    - \* section: [index] (Use with relative: top, bottom)
    - \* column: [first | last] (Use with relative: top, bottom)

## Command Syntax

```
$ cci task run add_page_layout_fields
```

## Options

**--fields FIELDS** *Optional*

List of fields. See task info for structure.

**--pages PAGES** *Optional*

List of Visualforce Pages. See task info for structure.

**--api\_names APINAMES** *Optional*

List of API names of entities to affect

**--managed MANAGED** *Optional*

If False, changes namespace\_inject to replace tokens with a blank string

**--namespace\_inject NAMESPACEINJECT** *Optional*

If set, the namespace tokens in files and filenames are replaced with the namespace's prefix

**--api\_version APIVERSION** *Optional*

Metadata API version to use, if not project\_\_package\_\_api\_version.

### 15.2.4 add\_standard\_value\_set\_entries

**Description:** Adds specified picklist entries to a Standard Value Set.

**Class:** cumulusci.tasks.metadata\_etl.AddValueSetEntries

#### Command Syntax

```
$ cci task run add_standard_value_set_entries
```

#### Options

**--api\_names APINAMES** *Required*

List of API names of StandardValueSets to affect, such as 'OpportunityStage', 'AccountType', 'CaseStatus', 'LeadStatus'

**--entries ENTRIES** *Required*

Array of standardValues to insert. Each standardValue should contain the keys 'fullName', the API name of the entry, and 'label', the user-facing label. OpportunityStage entries require the additional keys 'closed', 'won', 'forecastCategory', and 'probability'; CaseStatus entries require 'closed'; LeadStatus entries require 'converted'.

**--managed MANAGED** *Optional*

If False, changes namespace\_inject to replace tokens with a blank string

**--namespace\_inject NAMESPACEINJECT** *Optional*

If set, the namespace tokens in files and filenames are replaced with the namespace's prefix

Default: \$project\_config.project\_\_package\_\_namespace

**--api\_version APIVERSION** *Optional*

Metadata API version to use, if not project\_\_package\_\_api\_version.

### 15.2.5 add\_picklist\_entries

**Description:** Adds specified picklist entries to a custom picklist field.

**Class:** cumulusci.tasks.metadata\_etl.picklists.AddPicklistEntries

#### Command Syntax

```
$ cci task run add_picklist_entries
```

## Options

### **--picklists PICKLISTS** *Required*

List of picklists to affect, in Object\_\_c.Field\_\_c form.

### **--entries ENTRIES** *Required*

Array of picklist values to insert. Each value should contain the keys 'fullName', the API name of the entry, and 'label', the user-facing label. Optionally, specify *default: True* on exactly one entry to make that value the default. Any existing values will not be affected other than setting the default (labels of existing entries are not changed). To order values, include the 'add\_before' key. This will insert the new value before the existing value with the given API name, or at the end of the list if not present.

### **--record\_types RECORDTYPES** *Optional*

List of Record Type developer names for which the new values should be available. If any of the entries have *default: True*, they are also made default for these Record Types. Any Record Types not present in the target org will be ignored, and \* is a wildcard. Default behavior is to do nothing.

### **--api\_names APINAMES** *Optional*

List of API names of entities to affect

### **--managed MANAGED** *Optional*

If False, changes namespace\_inject to replace tokens with a blank string

### **--namespace\_inject NAMESPACEINJECT** *Optional*

If set, the namespace tokens in files and filenames are replaced with the namespace's prefix

Default: \$project\_config.project\_\_package\_\_namespace

### **--api\_version APIVERSION** *Optional*

Metadata API version to use, if not project\_\_package\_\_api\_version.

## 15.2.6 add\_fields\_to\_field\_set

**Description:** Adds specified fields to a given field set.

**Class:** cumulusci.tasks.metadata\_etl.field\_sets.AddFieldsToFieldSet

## Command Syntax

```
$ cci task run add_fields_to_field_set
```

## Options

### **--field\_set FIELDSET** *Required*

Name of field set to affect, in Object\_\_c.FieldSetName form.

### **--fields FIELDS** *Required*

Array of field API names to add to the field set. Can include related fields using AccountId.Name or Lookup\_\_r.CustomField\_\_c style syntax.

### **--api\_names APINAMES** *Optional*

List of API names of entities to affect



**--managed MANAGED** *Optional*

If False, changes namespace\_inject to replace tokens with a blank string

**--namespace\_inject NAMESPACEINJECT** *Optional*

If set, the namespace tokens in files and filenames are replaced with the namespace's prefix

**--api\_version APIVERSION** *Optional*

Metadata API version to use, if not project\_\_package\_\_api\_version.

## 15.2.7 add\_permission\_set\_perms

**Description:** Adds specified Apex class access and Field-Level Security to a Permission Set.

**Class:** cumulusci.tasks.metadata\_etl.AddPermissionSetPermissions

### Command Syntax

```
$ cci task run add_permission_set_perms
```

### Options

**--field\_permissions FIELDPERMISSIONS** *Optional*

Array of fieldPermissions objects to upsert into permission\_set. Each fieldPermission requires the following attributes: 'field': API Name of the field including namespace; 'readable': boolean if field can be read; 'editable': boolean if field can be edited

**--class\_accesses CLASSACCESSES** *Optional*

Array of classAccesses objects to upsert into permission\_set. Each classAccess requires the following attributes: 'apexClass': Name of Apex Class. If namespaced, make sure to use the form "namespace\_\_ApexClass"; 'enabled': boolean if the Apex Class can be accessed.

**--api\_names APINAMES** *Optional*

List of API names of entities to affect

**--managed MANAGED** *Optional*

If False, changes namespace\_inject to replace tokens with a blank string

**--namespace\_inject NAMESPACEINJECT** *Optional*

If set, the namespace tokens in files and filenames are replaced with the namespace's prefix

Default: \$project\_config.project\_\_package\_\_namespace

**--api\_version APIVERSION** *Optional*

Metadata API version to use, if not project\_\_package\_\_api\_version.

## 15.2.8 add\_record\_action\_list\_item

**Description:** Adds the specified ‘Record’ context Lightning button/action to the provided page layout.

**Class:** cumulusci.tasks.metadata\_etl.layouts.AddRecordPlatformActionListItem

Inserts the targeted lightning button/action into specified layout’s PlatformActionList with a ‘Record’ actionListContext. - If the targeted lightning button/action already exists,

the layout metadata is not modified.

- **If there is no ‘Record’ context PlatformActionList,** we will generate one and add the specified action

Task definition example:

```
dev_inject_apply_quick_action_into_account_layout: group: "Demo config and storytelling" description:
Adds an Apply Quick Action button to the beggining of the button list on the Experiences Account Layout.
class_path: tasks.layouts.InsertRecordPlatformActionListItem options:
```

```
  api_names: "Account-%%NAMESPACE%%Experiences Account Layout" action_name:
  "Account.Apply" action_type: QuickAction place_first: True
```

Reference Documentation: [https://developer.salesforce.com/docs/atlas.en-us.api\\_meta.meta/api\\_meta/meta\\_layouts.htm#PlatformActionList](https://developer.salesforce.com/docs/atlas.en-us.api_meta.meta/api_meta/meta_layouts.htm#PlatformActionList)

### Command Syntax

```
$ cci task run add_record_action_list_item
```

### Options

**--action\_type ACTIONTYPE** *Required*

platformActionListItems.actionType like ‘QuickAction’ or ‘CustomButton’

**--action\_name ACTIONNAME** *Required*

platformActionListItems.actionName. The API name for the action to be added.

**--place\_first PLACEFIRST** *Optional*

When ‘True’ the specified Record platformActionListItem will be inserted before any existing on the layout.  
Default is ‘False’

**--api\_names APINAMES** *Optional*

List of API names of entities to affect

**--managed MANAGED** *Optional*

If False, changes namespace\_inject to replace tokens with a blank string

**--namespace\_inject NAMESPACEINJECT** *Optional*

If set, the namespace tokens in files and filenames are replaced with the namespace’s prefix

**--api\_version APIVERSION** *Optional*

Metadata API version to use, if not project\_\_package\_\_api\_version.

### 15.2.9 assign\_compact\_layout

**Description:** Assigns the Compact Layout specified in the ‘value’ option to the Custom Objects in ‘api\_names’ option.

**Class:** `cumulusci.tasks.metadata_etl.UpdateMetadataFirstChildTextTask`

Metadata ETL task to update a single child element’s text within metadata XML.

If the child doesn’t exist, the child is created and appended to the Metadata. Furthermore, the value option is namespaced injected if the task is properly configured.

#### Example: Assign a Custom Object’s Compact Layout

Researching `CustomObject` in the Metadata API documentation or even retrieving the `CustomObject`’s Metadata for inspection, we see the `compactLayoutAssignment` Field. We want to assign a specific Compact Layout for our Custom Object, so we write the following CumulusCI task in our project’s `cumulusci.yml`.

```
tasks:
  assign_compact_layout:
    class_path: cumulusci.tasks.metadata_etl.UpdateMetadataFirstChildTextTask
    options:
      managed: False
      namespace_inject: $project_config.project__package__namespace
      entity: CustomObject
      api_names: OurCustomObject__c
      tag: compactLayoutAssignment
      value: "%%NAMESPACE%%DifferentCompactLayout"
      # We include a namespace token so it's easy to use this task in a managed_
↪ context.
```

Suppose the original CustomObject metadata XML looks like:

```
<?xml version="1.0" encoding="UTF-8"?>
<CustomObject xmlns="http://soap.sforce.com/2006/04/metadata">
  ...
  <label>Our Custom Object</label>
  <compactLayoutAssignment>OriginalCompactLayout</compactLayoutAssignment>
  ...
</CustomObject>
```

After running `cci task run assign_compact_layout`, the CustomObject metadata XML is deployed as:

```
<?xml version="1.0" encoding="UTF-8"?>
<CustomObject xmlns="http://soap.sforce.com/2006/04/metadata">
  ...
  <label>Our Custom Object</label>
  <compactLayoutAssignment>DifferentCompactLayout</compactLayoutAssignment>
  ...
</CustomObject>
```

## Command Syntax

```
$ cci task run assign_compact_layout
```

## Options

**--metadata\_type METADATATYPE** *Required*

Metadata Type

Default: CustomObject

**--tag TAG** *Required*

Targeted tag. The text of the first instance of this tag within the metadata entity will be updated.

Default: compactLayoutAssignment

**--value VALUE** *Required*

Desired value to set for the targeted tag's text. This value is namespace-injected.

**--api\_names APINAMES** *Optional*

List of API names of entities to affect

**--managed MANAGED** *Optional*

If False, changes namespace\_inject to replace tokens with a blank string

**--namespace\_inject NAMESPACEINJECT** *Optional*

If set, the namespace tokens in files and filenames are replaced with the namespace's prefix

Default: \$project\_config.project\_\_package\_\_namespace

**--api\_version APIVERSION** *Optional*

Metadata API version to use, if not project\_\_package\_\_api\_version.

### 15.2.10 assign\_permission\_sets

**Description:** Assigns specified Permission Sets to the current user, if not already assigned.

**Class:** cumulusci.tasks.salesforce.users.permsets.AssignPermissionSets

Assigns Permission Sets whose Names are in `api_names` to either the default org user or the user whose Alias is `user_alias`. This task skips assigning Permission Sets that are already assigned.

## Command Syntax

```
$ cci task run assign_permission_sets
```

## Options

**--api\_names** *APINAMES* *Required*

API Names of desired Permission Sets, separated by commas.

**--user\_alias** *USERALIAS* *Optional*

Target user aliases, separated by commas. Defaults to the current running user.

### 15.2.11 assign\_permission\_set\_groups

**Description:** Assigns specified Permission Set Groups to the current user, if not already assigned.

**Class:** cumulusci.tasks.salesforce.users.permsets.AssignPermissionSetGroups

Assigns Permission Set Groups whose Developer Names are in `api_names` to either the default org user or the user whose Alias is `user_alias`. This task skips assigning Permission Set Groups that are already assigned.

## Command Syntax

```
$ cci task run assign_permission_set_groups
```

## Options

**--api\_names** *APINAMES* *Required*

API Developer Names of desired Permission Set Groups, separated by commas.

**--user\_alias** *USERALIAS* *Optional*

Alias of target user (if not the current running user, the default).

### 15.2.12 assign\_permission\_set\_licenses

**Description:** Assigns specified Permission Set Licenses to the current user, if not already assigned.

**Class:** cumulusci.tasks.salesforce.users.permsets.AssignPermissionSetLicenses

Assigns Permission Set Licenses whose Developer Names are in `api_names` to either the default org user or the user whose Alias is `user_alias`. This task skips assigning Permission Set Licenses that are already assigned.

Permission Set Licenses are usually associated with a Permission Set, and assigning the Permission Set usually assigns the associated Permission Set License automatically. However, in non-namespaced developer scratch orgs, assigning the associated Permission Set may not automatically assign the Permission Set License, and this task will ensure the Permission Set Licenses are assigned.

## Command Syntax

```
$ cci task run assign_permission_set_licenses
```

## Options

**--api\_names** *APINAMES* *Required*

API Developer Names of desired Permission Set Licenses, separated by commas.

**--user\_alias** *USERALIAS* *Optional*

Alias of target user (if not the current running user, the default).

### 15.2.13 batch\_apex\_wait

**Description:** Waits on a batch apex or queueable apex job to finish.

**Class:** cumulusci.tasks.apex.batch.BatchApexWait

## Command Syntax

```
$ cci task run batch_apex_wait
```

## Options

**--class\_name** *CLASSNAME* *Required*

Name of the Apex class to wait for.

**--poll\_interval** *POLLINTERVAL* *Optional*

Seconds to wait before polling for batch or queueable job completion. Defaults to 10 seconds.

### 15.2.14 check\_my\_domain\_active

**Description:** Runs as a preflight check to determine whether My Domain is active.

**Class:** cumulusci.tasks.preflight.settings.CheckMyDomainActive

## Command Syntax

```
$ cci task run check_my_domain_active
```

### 15.2.15 check\_subjects\_available

**Description:** Runs as a preflight check to determine whether specific sObjects are available.

**Class:** cumulusci.tasks.preflight.subjects.CheckSObjectsAvailable

As a MetaDeploy preflight check, validates that an sObject is present in the schema.

The task can be used as a preflight check thus:

```
3:
  task: insert_subject_records
  checks:
    - when: "'ContentNote' not in tasks.check_subjects_available()"
      action: error
      message: "Enhanced Notes are not turned on."
```

#### Command Syntax

```
$ cci task run check_subjects_available
```

### 15.2.16 check\_subject\_permissions

**Description:** Runs as a preflight check to determine whether specific sObjects are permissioned as desired (options are required).

**Class:** cumulusci.tasks.preflight.subjects.CheckSObjectPerms

As a MetaDeploy preflight check, validates that an sObject's permissions are in the expected state.

For example, specify:

```
check_subject_permissions:
  options:
    Account:
      createable: True
      updateable: False
    Contact:
      createable: False
```

to validate that the Account object is createable but not updateable, and the Contact object is not createable. The output is True if all sObjects and permissions are present and matching the specification.

Given the above configuration, the task can be used as a preflight check in a MetaDeploy plan:

```
3:
  task: insert_subject_records
  checks:
    - when: "not tasks.check_subject_permissions()"
      action: error
      message: "sObject permissions are not configured correctly."
```

## Command Syntax

```
$ cci task run check_sobject_permissions
```

## Options

**--permissions PERMISSIONS** *Required*

The object permissions to check. Each key should be an sObject API name, whose value is a map of describe keys, such as *queryable* and *createable*, to their desired values (True or False). The output is True if all sObjects and permissions are present and matching the specification. See the task documentation for examples.

### 15.2.17 check\_advanced\_currency\_management

**Description:** Runs as a preflight check to determine whether Advanced Currency Management is active (True result means the feature is active).

**Class:** cumulusci.tasks.preflight.objects.CheckSObjectPerms

As a MetaDeploy preflight check, validates that an sObject's permissions are in the expected state.

For example, specify:

```
check_sobject_permissions:
  options:
    Account:
      createable: True
      updateable: False
    Contact:
      createable: False
```

to validate that the Account object is createable but not updateable, and the Contact object is not createable. The output is True if all sObjects and permissions are present and matching the specification.

Given the above configuration, the task can be used as a preflight check in a MetaDeploy plan:

```
3:
  task: insert_sobject_records
  checks:
    - when: "not tasks.check_sobject_permissions()"
      action: error
      message: "sObject permissions are not configured correctly."
```

## Command Syntax

```
$ cci task run check_advanced_currency_management
```



## Options

### --permissions PERMISSIONS *Required*

The object permissions to check. Each key should be an sObject API name, whose value is a map of describe keys, such as *queryable* and *createable*, to their desired values (True or False). The output is True if all sObjects and permissions are present and matching the specification. See the task documentation for examples.

Default: {'DatedConversionRate': {'createable': True}}

## 15.2.18 check\_org\_wide\_defaults

**Description:** Runs as a preflight check to validate Organization-Wide Defaults.

**Class:** cumulusci.tasks.preflight.subjects.CheckSObjectOWDs

As a MetaDeploy preflight check, validates that an sObject's Org-Wide Defaults are in the expected state.

For example, specify:

```
check_org_wide_defaults:
  options:
    org_wide_defaults:
      - api_name: Account
        internal_sharing_model: Private
        external_sharing_model: Private
      - api_name: Contact
        internal_sharing_model: Private
```

to validate that the Account object has Private internal and external OWDs, and Contact a Private internal model. The output is True if all sObjects and permissions are present and matching the specification.

Given the above configuration, the task can be used as a preflight check in a MetaDeploy plan:

```
3:
  task: insert_subject_records
  checks:
    - when: "not tasks.check_org_wide_defaults()"
      action: error
      message: "Org-Wide Defaults are not configured correctly."
```

## Command Syntax

```
$ cci task run check_org_wide_defaults
```

## Options

**--org\_wide\_defaults** **ORGWIDEDEFAULTS** *Required*

The Organization-Wide Defaults to check, organized as a list with each element containing the keys `api_name`, `internal_sharing_model`, and `external_sharing_model`. NOTE: you must have External Sharing Model turned on in Sharing Settings to use the latter feature. Checking External Sharing Model when it is turned off will fail the preflight.

### 15.2.19 check\_org\_settings\_value

**Description:** Runs as a preflight check to validate organization settings.

**Class:** `cumulusci.tasks.preflight.settings.CheckSettingsValue`

## Command Syntax

```
$ cci task run check_org_settings_value
```

## Options

**--settings\_type** **SETTINGSTYPE** *Required*

The API name of the Settings entity to be checked, such as `ChatterSettings`.

**--settings\_field** **SETTINGSFIELD** *Required*

The API name of the field on the Settings entity to check.

**--value** **VALUE** *Required*

The value to check for

**--treat\_missing\_as\_failure** **TREATMISSINGASFAILURE** *Optional*

If True, treat a missing Settings entity as a preflight failure, instead of raising an exception. Defaults to False.

### 15.2.20 check\_chatter\_enabled

**Description:** Runs as a preflight check to validate Chatter is enabled.

**Class:** `cumulusci.tasks.preflight.settings.CheckSettingsValue`

## Command Syntax

```
$ cci task run check_chatter_enabled
```

## Options

**--settings\_type** **SETTINGSTYPE** *Required*

The API name of the Settings entity to be checked, such as ChatterSettings.

Default: ChatterSettings

**--settings\_field** **SETTINGSFIELD** *Required*

The API name of the field on the Settings entity to check.

Default: IsChatterEnabled

**--value** **VALUE** *Required*

The value to check for

Default: True

**--treat\_missing\_as\_failure** **TREATMISSINGASFAILURE** *Optional*

If True, treat a missing Settings entity as a preflight failure, instead of raising an exception. Defaults to False.

### 15.2.21 check\_enhanced\_notes\_enabled

**Description:** Preflight check to validate that Enhanced Notes are enabled.

**Class:** cumulusci.tasks.preflight.settings.CheckSettingsValue

## Command Syntax

```
$ cci task run check_enhanced_notes_enabled
```

## Options

**--settings\_type** **SETTINGSTYPE** *Required*

The API name of the Settings entity to be checked, such as ChatterSettings.

Default: EnhancedNotesSettings

**--settings\_field** **SETTINGSFIELD** *Required*

The API name of the field on the Settings entity to check.

Default: IsEnhancedNotesEnabled

**--value** **VALUE** *Required*

The value to check for

Default: True

**--treat\_missing\_as\_failure** **TREATMISSINGASFAILURE** *Optional*

If True, treat a missing Settings entity as a preflight failure, instead of raising an exception. Defaults to False.

### 15.2.22 custom\_settings\_value\_wait

**Description:** Waits for a specific field value on the specified custom settings object and field

**Class:** cumulusci.tasks.salesforce.custom\_settings\_wait.CustomSettingValueWait

#### Command Syntax

```
$ cci task run custom_settings_value_wait
```

#### Options

**--object OBJECT** *Required*

Name of the Hierarchical Custom Settings object to query. Can include the `%%%NAMESPACE%%%` token.

**--field FIELD** *Required*

Name of the field on the Custom Settings to query. Can include the `%%%NAMESPACE%%%` token.

**--value VALUE** *Required*

Value of the field to wait for (String, Integer or Boolean).

**--managed MANAGED** *Optional*

If True, will insert the project's namespace prefix. Defaults to False or no namespace.

**--namespaced NAMESPACED** *Optional*

If True, the `%%%NAMESPACE%%%` token will get replaced with the namespace prefix for the object and field. Defaults to False.

**--poll\_interval POLLINTERVAL** *Optional*

Seconds to wait before polling for batch job completion. Defaults to 10 seconds.

### 15.2.23 command

**Description:** Run an arbitrary command

**Class:** cumulusci.tasks.command.Command

**Example Command-line Usage:** `cci task run command -o command "echo 'Hello command task!'"`

**Example Task to Run Command:**

```
hello_world:
  description: Says hello world
  class_path: cumulusci.tasks.command.Command
  options:
    command: echo 'Hello World!'
```

## Command Syntax

```
$ cci task run command
```

## Options

**--command** **COMMAND** *Required*

The command to execute

**--pass\_env** **PASSENV** *Required*

If False, the current environment variables will not be passed to the child process. Defaults to True

**--dir** **DIR** *Optional*

If provided, the directory where the command should be run from.

**--env** **ENV** *Optional*

Environment variables to set for command. Must be flat dict, either as python dict from YAML or as JSON string.

**--interactive** **INTERACTIVE** *Optional*

If True, the command will use stderr, stdout, and stdin of the main process. Defaults to False.

### 15.2.24 composite\_request

**Description:** Execute a series of REST API requests in a single call

**Class:** cumulusci.tasks.salesforce.composite.CompositeApi

This task is a wrapper for Composite REST API calls. Given a list of JSON files (one request body per file), POST each and process the returned composite result. Files are processed in the order given by the `data_files` option.

In addition, this task will process the request body and replace namespace (%%NAMESPACE%%) and user ID (%%USERID%%) tokens. To avoid username collisions, use the `randomize_username` option to replace the top-level domains in any Username field with a random string.

When the top-level `allOrNone` property for the request is set to true a `SalesforceException` is raised if an error is returned for any subrequest, otherwise partial successes will not raise an exception.

## Example Task Definition

```
tasks:
  example_composite_request:
    class_path: cumulusci.tasks.salesforce.composite.CompositeApi
    options:
      data_files:
        - "datasets/composite/users.json"
        - "datasets/composite/setup_objects.json"
```

## Command Syntax

```
$ cci task run composite_request
```

## Options

**--data\_files DATAFILES** *Required*

A list of paths, where each path is a JSON file containing a composite request body.

**--managed MANAGED** *Optional*

If True, replaces namespace tokens with the namespace prefix.

**--namespaced NAMESPACED** *Optional*

If True, replaces namespace tokens with the namespace prefix.

**--randomize\_username RANDOMIZEUSERNAME** *Optional*

If True, randomize the TLD for any 'Username' fields.

### 15.2.25 create\_community

**Description:** Creates a Community in the target org using the Connect API

**Class:** cumulusci.tasks.salesforce.CreateCommunity

Create a Salesforce Community via the Connect API.

Specify the *template* "VF Template" for Visualforce Tabs community, or the name for a specific desired template

## Command Syntax

```
$ cci task run create_community
```

## Options

**--template TEMPLATE** *Required*

Name of the template for the community.

**--name NAME** *Required*

Name of the community.

**--description DESCRIPTION** *Optional*

Description of the community.

**--url\_path\_prefix URLPATHPREFIX** *Optional*

URL prefix for the community.

**--retries RETRIES** *Optional*

Number of times to retry community creation request

**--timeout TIMEOUT** *Optional*

Time to wait, in seconds, for the community to be created

**--skip\_existing** **SKIPEXISTING** *Optional*

If True, an existing community with the same name will not raise an exception.

### 15.2.26 connected\_app

**Description:** Creates the Connected App needed to use persistent orgs in the CumulusCI keychain

**Class:** cumulusci.tasks.connectedapp.CreateConnectedApp

#### Command Syntax

```
$ cci task run connected_app
```

#### Options

**--label** **LABEL** *Required*

The label for the connected app. Must contain only alphanumeric and underscores

Default: CumulusCI

**--email** **EMAIL** *Optional*

The email address to associate with the connected app. Defaults to email address from the github service if configured.

**--username** **USERNAME** *Optional*

Create the connected app in a different org. Defaults to the defaultdevhubusername configured in sfdx.

**--connect** **CONNECT** *Optional*

If True, the created connected app will be stored as the CumulusCI connected\_app service in the keychain.

Default: True

**--overwrite** **OVERWRITE** *Optional*

If True, any existing connected\_app service in the CumulusCI keychain will be overwritten. Has no effect if the connect option is False.

### 15.2.27 create\_network\_member\_groups

**Description:** Creates NetworkMemberGroup records which grant access to an Experience Site (Community) for specified Profiles or Permission Sets

**Class:** cumulusci.tasks.salesforce.network\_member\_group.CreateNetworkMemberGroups

## Command Syntax

```
$ cci task run create_network_member_groups
```

## Options

**--network\_name NETWORKNAME** *Required*

Name of Network to add NetworkMemberGroup children records.

**--profile\_names PROFILENAMES** *Optional*

List of Profile Names to add as NetworkMemberGroups for this Network.

**--permission\_set\_names PERMISSIONSETNAMES** *Optional*

List of PermissionSet Names to add as NetworkMemberGroups for this Network.

### 15.2.28 insert\_record

**Description:** Inserts a record of any sObject using the REST API

**Class:** cumulusci.tasks.salesforce.insert\_record.InsertRecord

For example:

```
cci task run insert_record --org dev -o object PermissionSet -o values Name:HardDelete,PermissionsBulkApiHardDelete:true
```

## Command Syntax

```
$ cci task run insert_record
```

## Options

**--object OBJECT** *Required*

An sObject type to insert

**--values VALUES** *Required*

Field names and values in the format 'aa:bb,cc:dd', or a YAML dict in cumulusci.yml.

**--tooling TOOLING** *Optional*

If True, use the Tooling API instead of REST API.

### 15.2.29 create\_package

**Description:** Creates a package in the target org with the default package name for the project

**Class:** cumulusci.tasks.salesforce.CreatePackage



## Command Syntax

```
$ cci task run create_package
```

## Options

**--package PACKAGE** *Required*

The name of the package to create. Defaults to project\_\_package\_\_name

**--api\_version APIVERSION** *Required*

The api version to use when creating the package. Defaults to project\_\_package\_\_api\_version

### 15.2.30 create\_package\_version

**Description:** Uploads a 2nd-generation package (2GP) version

**Class:** cumulusci.tasks.create\_package\_version.CreatePackageVersion

## Command Syntax

```
$ cci task run create_package_version
```

## Options

**--package\_type PACKAGETYPE** *Required*

Package type (Unlocked or Managed)

**--package\_name PACKAGENAME** *Optional*

Name of package

**--namespace NAMESPACE** *Optional*

Package namespace

**--version\_name VERSIONNAME** *Optional*

Version name

**--version\_base VERSIONBASE** *Optional*

The version number to use as a base before incrementing. Optional; defaults to the highest existing version number of this package. Can be set to `latest_github_release` to use the version of the most recent release published to GitHub.

**--version\_type VERSIONTYPE** *Optional*

The part of the version number to increment. Options are major, minor, patch, build. Defaults to build

**--skip\_validation SKIPVALIDATION** *Optional*

If true, skip validation of the package version. Default: false. Skipping validation creates packages more quickly, but they cannot be promoted for release.

**--org\_dependent ORGDEPENDENT** *Optional*

If true, create an org-dependent unlocked package. Default: false.

**--post\_install\_script** POSTINSTALLSCRIPT *Optional*

Post-install script (for managed packages)

**--uninstall\_script** UNINSTALLSCRIPT *Optional*

Uninstall script (for managed packages)

**--force\_upload** FORCEUPLOAD *Optional*

If true, force creating a new package version even if one with the same contents already exists

**--static\_resource\_path** STATICRESOURCEPATH *Optional*

The path where decompressed static resources are stored. Any subdirectories found will be zipped and added to the staticresources directory of the build.

**--ancestor\_id** ANCESTORID *Optional*

The 04t Id to use for the ancestor of this package. Optional; defaults to no ancestor specified. Can be set to latest\_github\_release to use the most recent production version published to GitHub.

**--resolution\_strategy** RESOLUTIONSTRATEGY *Optional*

The name of a sequence of resolution\_strategy (from project\_\_dependency\_resolutions) to apply to dynamic dependencies. Defaults to 'production'.

**--create\_unlocked\_dependency\_packages** CREATEUNLOCKEDDEPENDENCYPACKAGES *Optional*

If True, create unlocked packages for unpackaged metadata in this project and dependencies. Defaults to False.

### 15.2.31 create\_managed\_src

**Description:** Modifies the src directory for managed deployment. Strips //cumulusci-managed from all Apex code

**Class:** cumulusci.tasks.metadata.managed\_src.CreateManagedSrc

Apex classes which use the @deprecated annotation can comment it out using //cumulusci-managed so that it can be deployed as part of unmanaged metadata, where this annotation is not allowed. This task is for use when deploying to a packaging org to remove the comment so that the annotation takes effect.

#### Command Syntax

```
$ cci task run create_managed_src
```

#### Options

**--path** PATH *Required*

The path containing metadata to process for managed deployment

Default: src

**--revert\_path** REVERTPATH *Required*

The path to copy the original metadata to for the revert call

Default: src.orig

### 15.2.32 create\_permission\_set

**Description:** Creates a Permission Set with specified User Permissions and assigns it to the running user.

**Class:** cumulusci.tasks.salesforce.create\_permission\_sets.CreatePermissionSet

#### Command Syntax

```
$ cci task run create_permission_set
```

#### Options

**--api\_name APINAME** *Required*

API name of generated Permission Set

**--user\_permissions USERPERMISSIONS** *Required*

List of User Permissions to include in the Permission Set.

**--label LABEL** *Optional*

Label of generated Permission Set

### 15.2.33 create\_bulk\_data\_permission\_set

**Description:** Creates a Permission Set with the Hard Delete and Set Audit Fields user permissions. NOTE: the org setting to allow Set Audit Fields must be turned on.

**Class:** cumulusci.tasks.salesforce.create\_permission\_sets.CreatePermissionSet

#### Command Syntax

```
$ cci task run create_bulk_data_permission_set
```

#### Options

**--api\_name APINAME** *Required*

API name of generated Permission Set

Default: CumulusCI\_Bulk\_Data

**--user\_permissions USERPERMISSIONS** *Required*

List of User Permissions to include in the Permission Set.

Default: ['PermissionsBulkApiHardDelete', 'PermissionsCreateAuditFields']

**--label LABEL** *Optional*

Label of generated Permission Set

Default: CumulusCI Bulk Data

### 15.2.34 create\_unmanaged\_ee\_src

**Description:** Modifies the src directory for unmanaged deployment to an EE org

**Class:** cumulusci.tasks.metadata.ee\_src.CreateUnmanagedEESrc

#### Command Syntax

```
$ cci task run create_unmanaged_ee_src
```

#### Options

**--path PATH** *Required*

The path containing metadata to process for managed deployment

Default: src

**--revert\_path REVERTPATH** *Required*

The path to copy the original metadata to for the revert call

Default: src.orig

### 15.2.35 delete\_data

**Description:** Query existing data for a specific sObject and perform a Bulk API delete of all matching records.

**Class:** cumulusci.tasks.bulkdata.DeleteData

#### Command Syntax

```
$ cci task run delete_data
```

#### Options

**--objects OBJECTS** *Required*

A list of objects to delete records from in order of deletion. If passed via command line, use a comma separated string

**--where WHERE** *Optional*

A SOQL where-clause (without the keyword WHERE). Only available when 'objects' is length 1.

**--hardDelete HARDDELETE** *Optional*

If True, perform a hard delete, bypassing the Recycle Bin. Note that this requires the Bulk API Hard Delete permission. Default: False

**--ignore\_row\_errors IGNOREROWERRORS** *Optional*

If True, allow the operation to continue even if individual rows fail to delete.

**--inject\_namespaces INJECTNAMESPACES** *Optional*

If True, the package namespace prefix will be automatically added to (or removed from) objects and fields based on the name used in the org. Defaults to True.

**--api API** *Optional*

The desired Salesforce API to use, which may be 'rest', 'bulk', or 'smart' to auto-select based on record volume. The default is 'smart'.

**15.2.36 deploy**

**Description:** Deploys the src directory of the repository to the org

**Class:** cumulusci.tasks.salesforce.Deploy

**Command Syntax**

```
$ cci task run deploy
```

**Options****--path PATH** *Required*

The path to the metadata source to be deployed

Default: src

**--unmanaged UNMANAGED** *Optional*

If True, changes namespace\_inject to replace tokens with a blank string

**--namespace\_inject NAMESPACEINJECT** *Optional*

If set, the namespace tokens in files and filenames are replaced with the namespace's prefix

**--namespace\_strip NAMESPACESTRIP** *Optional*

If set, all namespace prefixes for the namespace specified are stripped from files and filenames

**--check\_only CHECKONLY** *Optional*

If True, performs a test deployment (validation) of components without saving the components in the target org

**--test\_level TESTLEVEL** *Optional*

Specifies which tests are run as part of a deployment. Valid values: NoTestRun, RunLocalTests, RunAllTestsInOrg, RunSpecifiedTests.

**--specified\_tests SPECIFIEDTESTS** *Optional*

Comma-separated list of test classes to run upon deployment. Applies only with test\_level set to RunSpecifiedTests.

**--static\_resource\_path STATICRESOURCEPATH** *Optional*

The path where decompressed static resources are stored. Any subdirectories found will be zipped and added to the staticresources directory of the build.

**--namespaced\_org NAMESPACEDORG** *Optional*

If True, the tokens %%%NAMESPACED\_ORG%% and \_\_NAMESPACED\_ORG\_\_ will get replaced with the namespace. The default is false causing those tokens to get stripped and replaced with an empty string. Set this if deploying to a namespaced scratch org or packaging org.

**--clean\_meta\_xml** **CLEANMETAXML** *Optional*

Defaults to True which strips the <packageVersions/> element from all meta.xml files. The packageVersion element gets added automatically by the target org and is set to whatever version is installed in the org. To disable this, set this option to False

### 15.2.37 deploy\_marketing\_cloud\_package

**Description:** Deploys a package zip file to a Marketing Cloud Tenant via the Marketing Cloud Package Manager API.

**Class:** cumulusci.tasks.marketing\_cloud.deploy.MarketingCloudDeployTask

#### Command Syntax

```
$ cci task run deploy_marketing_cloud_package
```

#### Options

**--package\_zip\_file** **PACKAGEZIPFILE** *Required*

Path to the package zipfile that will be deployed.

**--custom\_inputs** **CUSTOMINPUTS** *Optional*

Specify custom inputs to the deployment task. Takes a mapping from input key to input value (e.g. 'company-Name:Acme,companyWebsite:https://www.salesforce.org:8080').

**--name** **NAME** *Optional*

The name to give to this particular deploy call. Defaults to a universally unique identifier.

### 15.2.38 marketing\_cloud\_create\_subscriber\_attribute

**Description:** Creates a Subscriber Attribute via the Marketing Cloud SOAP API.

**Class:** cumulusci.tasks.marketing\_cloud.api.CreateSubscriberAttribute

#### Command Syntax

```
$ cci task run marketing_cloud_create_subscriber_attribute
```

#### Options

**--attribute\_name** **ATTRIBUTENAME** *Required*

The name of the Subscriber Attribute to deploy via the Marketing Cloud API.

### 15.2.39 marketing\_cloud\_create\_user

**Description:** Creates a new User via the Marketing Cloud SOAP API.

**Class:** cumulusci.tasks.marketing\_cloud.api.CreateUser

#### Command Syntax

```
$ cci task run marketing_cloud_create_user
```

#### Options

**--parent\_bu\_mid PARENTBUMID** *Required*

Specify the MID for Parent BU.

**--default\_bu\_mid DEFAULTBUMID** *Required*

Set MID for BU to use as default (can be same as the parent).

**--user\_email USEREMAIL** *Required*

Set the User's email.

**--user\_password USERPASSWORD** *Required*

Set the User's password.

**--user\_username USERUSERNAME** *Required*

Set the User's username. Not the same as their name.

**--external\_key EXTERNALKEY** *Optional*

Set the User's external key.

**--user\_name USERNAME** *Optional*

Set the User's name. Not the same as their username.

**--role\_id ROLEID** *Optional*

Assign a Role to the new User, specified as an ID. IDs for system defined roles located here: [https://developer.salesforce.com/docs/atlas.en-us.noversion.mc-apis.meta/mc-apis/setting\\_user\\_permissions\\_via\\_the\\_web\\_services\\_api.htm](https://developer.salesforce.com/docs/atlas.en-us.noversion.mc-apis.meta/mc-apis/setting_user_permissions_via_the_web_services_api.htm)

### 15.2.40 marketing\_cloud\_update\_user\_role

**Description:** Assigns a Role to an existing User via the Marketing Cloud SOAP API.

**Class:** cumulusci.tasks.marketing\_cloud.api.UpdateUserRole

## Command Syntax

```
$ cci task run marketing_cloud_update_user_role
```

## Options

**--account\_mid ACCOUNTMID** *Required*

Specify the Account MID.

**--user\_email USEREMAIL** *Required*

Specify the User's email.

**--user\_password USERPASSWORD** *Required*

Specify the User's password.

**--role\_id ROLEID** *Required*

Assign a Role to the User, specified as an ID. IDs for system defined roles located here: [https://developer.salesforce.com/docs/atlas.en-us.noversion.mc-apis.meta/mc-apis/setting\\_user\\_permissions\\_via\\_the\\_web\\_services\\_api.htm](https://developer.salesforce.com/docs/atlas.en-us.noversion.mc-apis.meta/mc-apis/setting_user_permissions_via_the_web_services_api.htm)

**--external\_key EXTERNALKEY** *Optional*

Specify the User's external key.

**--user\_name USERNAME** *Optional*

Specify the User's name. Not the same as their username.

## 15.2.41 deploy\_pre

**Description:** Deploys all metadata bundles under unpackaged/pre/

**Class:** cumulusci.tasks.salesforce.DeployBundles

## Command Syntax

```
$ cci task run deploy_pre
```

## Options

**--path PATH** *Required*

The path to the parent directory containing the metadata bundles directories

Default: unpackaged/pre

**--unmanaged UNMANAGED** *Optional*

If True, changes namespace\_inject to replace tokens with a blank string

**--namespace\_inject NAMESPACEINJECT** *Optional*

If set, the namespace tokens in files and filenames are replaced with the namespace's prefix

**--namespace\_strip NAMESPACESTRIP** *Optional*

If set, all namespace prefixes for the namespace specified are stripped from files and filenames



**--check\_only CHECKONLY** *Optional*

If True, performs a test deployment (validation) of components without saving the components in the target org

**--test\_level TESTLEVEL** *Optional*

Specifies which tests are run as part of a deployment. Valid values: NoTestRun, RunLocalTests, RunAllTestsInOrg, RunSpecifiedTests.

**--specified\_tests SPECIFIEDTESTS** *Optional*

Comma-separated list of test classes to run upon deployment. Applies only with test\_level set to RunSpecifiedTests.

**--static\_resource\_path STATICRESOURCEPATH** *Optional*

The path where decompressed static resources are stored. Any subdirectories found will be zipped and added to the staticresources directory of the build.

**--namespaced\_org NAMESPACEDORG** *Optional*

If True, the tokens `%%NAMESPACED_ORG%%` and `__NAMESPACED_ORG__` will get replaced with the namespace. The default is false causing those tokens to get stripped and replaced with an empty string. Set this if deploying to a namespaced scratch org or packaging org.

**--clean\_meta\_xml CLEANMETAXML** *Optional*

Defaults to True which strips the `<packageVersions/>` element from all meta.xml files. The packageVersion element gets added automatically by the target org and is set to whatever version is installed in the org. To disable this, set this option to False

## 15.2.42 deploy\_post

**Description:** Deploys all metadata bundles under `unpackaged/post/`

**Class:** `cumulusci.tasks.salesforce.DeployBundles`

### Command Syntax

```
$ cci task run deploy_post
```

### Options

**--path PATH** *Required*

The path to the parent directory containing the metadata bundles directories

Default: `unpackaged/post`

**--unmanaged UNMANAGED** *Optional*

If True, changes namespace\_inject to replace tokens with a blank string

**--namespace\_inject NAMESPACEINJECT** *Optional*

If set, the namespace tokens in files and filenames are replaced with the namespace's prefix

**--namespace\_strip NAMESPACESTRIP** *Optional*

If set, all namespace prefixes for the namespace specified are stripped from files and filenames

**--check\_only CHECKONLY** *Optional*

If True, performs a test deployment (validation) of components without saving the components in the target org

**--test\_level TESTLEVEL** *Optional*

Specifies which tests are run as part of a deployment. Valid values: NoTestRun, RunLocalTests, RunAllTestsInOrg, RunSpecifiedTests.

**--specified\_tests SPECIFIEDTESTS** *Optional*

Comma-separated list of test classes to run upon deployment. Applies only with test\_level set to RunSpecifiedTests.

**--static\_resource\_path STATICRESOURCEPATH** *Optional*

The path where decompressed static resources are stored. Any subdirectories found will be zipped and added to the staticresources directory of the build.

**--namespaced\_org NAMESPACEDORG** *Optional*

If True, the tokens `%%NAMESPACED_ORG%%` and `__NAMESPACED_ORG__` will get replaced with the namespace. The default is false causing those tokens to get stripped and replaced with an empty string. Set this if deploying to a namespaced scratch org or packaging org.

**--clean\_meta\_xml CLEANMETAXML** *Optional*

Defaults to True which strips the `<packageVersions/>` element from all meta.xml files. The packageVersion element gets added automatically by the target org and is set to whatever version is installed in the org. To disable this, set this option to False

### 15.2.43 deploy\_qa\_config

**Description:** Deploys configuration for QA.

**Class:** cumulusci.tasks.salesforce.Deploy

#### Command Syntax

```
$ cci task run deploy_qa_config
```

#### Options

**--path PATH** *Required*

The path to the metadata source to be deployed

Default: unpackaged/config/qa

**--unmanaged UNMANAGED** *Optional*

If True, changes namespace\_inject to replace tokens with a blank string

**--namespace\_inject NAMESPACEINJECT** *Optional*

If set, the namespace tokens in files and filenames are replaced with the namespace's prefix

**--namespace\_strip NAMESPACESTRIP** *Optional*

If set, all namespace prefixes for the namespace specified are stripped from files and filenames

**--check\_only CHECKONLY** *Optional*

If True, performs a test deployment (validation) of components without saving the components in the target org

**--test\_level TESTLEVEL** *Optional*

Specifies which tests are run as part of a deployment. Valid values: NoTestRun, RunLocalTests, RunAllTestsInOrg, RunSpecifiedTests.

**--specified\_tests SPECIFIEDTESTS** *Optional*

Comma-separated list of test classes to run upon deployment. Applies only with test\_level set to RunSpecifiedTests.

**--static\_resource\_path STATICRESOURCEPATH** *Optional*

The path where decompressed static resources are stored. Any subdirectories found will be zipped and added to the staticresources directory of the build.

**--namespaced\_org NAMESPACEDORG** *Optional*

If True, the tokens `%%NAMESPACED_ORG%%` and `__NAMESPACED_ORG__` will get replaced with the namespace. The default is false causing those tokens to get stripped and replaced with an empty string. Set this if deploying to a namespaced scratch org or packaging org.

**--clean\_meta\_xml CLEANMETAXML** *Optional*

Defaults to True which strips the `<packageVersions/>` element from all meta.xml files. The packageVersion element gets added automatically by the target org and is set to whatever version is installed in the org. To disable this, set this option to False

## 15.2.44 dx

**Description:** Execute an arbitrary Salesforce DX command against an org. Use the ‘command’ option to specify the command, such as ‘force:package:install’

**Class:** cumulusci.tasks.sfdx.SFDXOrgTask

### Command Syntax

```
$ cci task run dx
```

### Options

**--command COMMAND** *Required*

The full command to run with the sfdx cli.

**--extra EXTRA** *Optional*

Append additional options to the command

### 15.2.45 dx\_convert\_to

**Description:** Converts src directory metadata format into sfdx format under force-app

**Class:** cumulusci.tasks.sfdx.SFDXBaseTask

#### Command Syntax

```
$ cci task run dx_convert_to
```

#### Options

**--command COMMAND** *Required*

The full command to run with the sfdx cli.

Default: force:mdapi:convert -r src

**--extra EXTRA** *Optional*

Append additional options to the command

### 15.2.46 dx\_convert\_from

**Description:** Converts force-app directory in sfdx format into metadata format under src

**Class:** cumulusci.tasks.sfdx.SFDXBaseTask

#### Command Syntax

```
$ cci task run dx_convert_from
```

#### Options

**--command COMMAND** *Required*

The full command to run with the sfdx cli.

Default: force:source:convert -d src

**--extra EXTRA** *Optional*

Append additional options to the command

### 15.2.47 dx\_pull

**Description:** Uses sfdx to pull from a scratch org into the force-app directory

**Class:** cumulusci.tasks.sfdx.SFDXOrgTask

## Command Syntax

```
$ cci task run dx_pull
```

## Options

**--command** **COMMAND** *Required*

The full command to run with the sfdx cli.

Default: force:source:pull

**--extra** **EXTRA** *Optional*

Append additional options to the command

## 15.2.48 dx\_push

**Description:** Uses sfdx to push the force-app directory metadata into a scratch org

**Class:** cumulusci.tasks.sfdx.SFDXOrgTask

## Command Syntax

```
$ cci task run dx_push
```

## Options

**--command** **COMMAND** *Required*

The full command to run with the sfdx cli.

Default: force:source:push

**--extra** **EXTRA** *Optional*

Append additional options to the command

## 15.2.49 enable\_einstein\_prediction

**Description:** Enable an Einstein Prediction Builder prediction.

**Class:** cumulusci.tasks.salesforce.enable\_prediction.EnablePrediction

This task updates the state of Einstein Prediction Builder predictions from 'Draft' to 'Enabled' by posting to the Tooling API.

```
cci task run enable_prediction --org dev -o api_names Example_Prediction_v0
```

## Command Syntax

```
$ cci task run enable_einstein_prediction
```

## Options

**--api\_names** **APINAMES** *Required*

List of API names of the MLPredictionDefinitions.

**--managed** **MANAGED** *Optional*

If False, changes namespace\_inject to replace tokens with a blank string

**--namespaced\_org** **NAMESPACEDORG** *Optional*

If False, changes namespace\_inject to replace namespaced-org tokens with a blank string

**--namespace\_inject** **NAMESPACEINJECT** *Optional*

If set, the namespace tokens in files and filenames are replaced with the namespace's prefix

## 15.2.50 ensure\_record\_types

**Description:** Ensure that a default Record Type is extant on the given standard sObject (custom objects are not supported). If Record Types are already present, do nothing.

**Class:** cumulusci.tasks.salesforce.EnsureRecordTypes

## Command Syntax

```
$ cci task run ensure_record_types
```

## Options

**--record\_type\_developer\_name** **RECORDTYPEDEVELOPERNAME** *Required*

The Developer Name of the Record Type (unique). Must contain only alphanumeric characters and underscores.

Default: Default

**--record\_type\_label** **RECORDTYPELABEL** *Required*

The Label of the Record Type.

Default: Default

**--sobject** **SUBJECT** *Required*

The sObject on which to deploy the Record Type and optional Business Process.

**--record\_type\_description** **RECORDTYPEDESCRIPTION** *Optional*

The Description of the Record Type. Only uses the first 255 characters.

**--force\_create** **FORCECREATE** *Optional*

If true, the Record Type will be created even if a default Record Type already exists on this sObject. Defaults to False.

### 15.2.51 execute\_anon

**Description:** Execute anonymous apex via the tooling api.

**Class:** cumulusci.tasks.apex.anon.AnonymousApexTask

Use the *apex* option to run a string of anonymous Apex. Use the *path* option to run anonymous Apex from a file. Or use both to concatenate the string to the file contents.

#### Command Syntax

```
$ cci task run execute_anon
```

#### Options

**--path PATH** *Optional*

The path to an Apex file to run.

**--apex APEX** *Optional*

A string of Apex to run (after the file, if specified).

**--managed MANAGED** *Optional*

If True, will insert the project's namespace prefix. Defaults to False or no namespace.

**--namespaced NAMESPACED** *Optional*

If True, the tokens `%%%NAMESPACED_RT%%%` and `%%%namespaced%%%` will get replaced with the namespace prefix for Record Types.

**--param1 PARAM1** *Optional*

Parameter to pass to the Apex. Use as `%%%PARAM_1%%%` in the Apex code. Defaults to an empty value.

**--param2 PARAM2** *Optional*

Parameter to pass to the Apex. Use as `%%%PARAM_2%%%` in the Apex code. Defaults to an empty value.

### 15.2.52 generate\_data\_dictionary

**Description:** Create a data dictionary for the project in CSV format.

**Class:** cumulusci.tasks.datadictionary.GenerateDataDictionary

Generate a data dictionary for the project by walking all GitHub releases. The data dictionary is output as two CSV files. One, in *object\_path*, includes

- Object Label
- Object API Name
- Object Description
- Version Introduced

with one row per packaged object.

The other, in *field\_path*, includes

- Object Label

- Object API Name
- Field Label
- Field API Name
- Field Type
- Valid Picklist Values
- Help Text
- Field Description
- Version Introduced
- Version Picklist Values Last Changed
- Version Help Text Last Changed

Both MDAPI and SFDX format releases are supported.

## Command Syntax

```
$ cci task run generate_data_dictionary
```

## Options

**--object\_path OBJECTPATH** *Optional*

Path to a CSV file to contain an sObject-level data dictionary.

**--field\_path FIELDPATH** *Optional*

Path to a CSV file to contain an field-level data dictionary.

**--include\_dependencies INCLUDEDDEPENDENCIES** *Optional*

Process all of the GitHub dependencies of this project and include their schema in the data dictionary.

**--additional\_dependencies ADDITIONALDEPENDENCIES** *Optional*

Include schema from additional GitHub repositories that are not explicit dependencies of this project to build a unified data dictionary. Specify as a list of dicts as in `project__dependencies` in `cumulusci.yml`. Note: only repository dependencies are supported.

**--include\_prerelease INCLUDEPRERELEASE** *Optional*

Treat the current branch as containing prerelease schema, and included it as Prerelease in the data dictionary. NOTE: this option cannot be used with *additional\_dependencies* or *include\_dependencies*.

**--include\_protected\_schema INCLUDEPROTECTEDSCHEMA** *Optional*

Include Custom Objects, Custom Settings, and Custom Metadata Types that are marked as Protected. Defaults to False.



### 15.2.53 generate\_and\_load\_from\_yaml

**Description:** None

**Class:** cumulusci.tasks.bulkdata.generate\_and\_load\_data\_from\_yaml.GenerateAndLoadDataFromYaml

#### Command Syntax

```
$ cci task run generate_and_load_from_yaml
```

#### Options

**--data\_generation\_task DATAGENERATIONTASK** *Required*

Fully qualified class path of a task to generate the data. Look at cumulusci.tasks.bulkdata.tests.dummy\_data\_factory to learn how to write them.

**--generator\_yaml GENERATORYAML** *Required*

A Snowfakery recipe file to use

**--num\_records NUMRECORDS** *Optional*

Target number of records. You will get at least this many records, but may get more. The recipe will always execute to completion, so if it creates 3 records per execution and you ask for 5, you will get 6.

**--num\_records\_tablename NUMRECORDSTABLENAME** *Optional*

A string representing which table determines when the recipe execution is done.

**--batch\_size BATCHSIZE** *Optional*

How many records to create and load at a time.

**--data\_generation\_options DATAGENERATIONOPTIONS** *Optional*

Options to pass to the data generator.

**--vars VARS** *Optional*

Pass values to override options in the format VAR1:foo,VAR2:bar

**--replace\_database REPLACEDATABASE** *Optional*

Confirmation that it is okay to delete the data in database\_url

**--working\_directory WORKINGDIRECTORY** *Optional*

Default path for temporary / working files

**--database\_url DATABASEURL** *Optional*

A path to put a copy of the sqlite database (for debugging)

**--mapping MAPPING** *Optional*

A mapping YAML file to use

**--start\_step STARTSTEP** *Optional*

If specified, skip steps before this one in the mapping

**--sql\_path SQLPATH** *Optional*

If specified, a database will be created from an SQL script at the provided path

**--ignore\_row\_errors IGNOREROWERRORS** *Optional*

If True, allow the load to continue even if individual rows fail to load.

**--reset\_oids RESETIDS** *Optional*

If True (the default), and the `_sf_ids` tables exist, reset them before continuing.

**--bulk\_mode BULKMODE** *Optional*

Set to Serial to force serial mode on all jobs. Parallel is the default.

**--inject\_namespaces INJECTNAMESPACES** *Optional*

If True, the package namespace prefix will be automatically added to (or removed from) objects and fields based on the name used in the org. Defaults to True.

**--drop\_missing\_schema DROPMISSINGSCHEMA** *Optional*

Set to True to skip any missing objects or fields instead of stopping with an error.

**--set\_recently\_viewed SETRECENTLYVIEWED** *Optional*

By default, the first 1000 records inserted via the Bulk API will be set as recently viewed. If fewer than 1000 records are inserted, existing objects of the same type being inserted will also be set as recently viewed.

**--generate\_mapping\_file GENERATEMAPPINGFILE** *Optional*

A path to put a mapping file inferred from the `generator_yaml`

**--continuation\_file CONTINUATIONFILE** *Optional*

YAML file generated by Snowfakery representing next steps for data generation

**--generate\_continuation\_file GENERATECONTINUATIONFILE** *Optional*

Path for Snowfakery to put its next continuation file

**--loading\_rules LOADINGRULES** *Optional*

Path to `.load.yml` file containing rules to use to load the file. Defaults to `<recipename>.load.yml`. Multiple files can be comma separated.

## 15.2.54 get\_installed\_packages

**Description:** Retrieves a list of the currently installed managed package namespaces and their versions

**Class:** `cumulusci.tasks.preflight.packages.GetInstalledPackages`

### Command Syntax

```
$ cci task run get_installed_packages
```

### 15.2.55 get\_available\_licenses

**Description:** Retrieves a list of the currently available license definition keys

**Class:** cumulusci.tasks.preflight.licenses.GetAvailableLicenses

#### Command Syntax

```
$ cci task run get_available_licenses
```

### 15.2.56 get\_available\_permission\_set\_licenses

**Description:** Retrieves a list of the currently available Permission Set License definition keys

**Class:** cumulusci.tasks.preflight.licenses.GetAvailablePermissionSetLicenses

#### Command Syntax

```
$ cci task run get_available_permission_set_licenses
```

### 15.2.57 get\_assigned\_permission\_sets

**Description:** Retrieves a list of the names of any permission sets assigned to the running user.

**Class:** cumulusci.tasks.preflight.permsets.GetPermissionSetAssignments

#### Command Syntax

```
$ cci task run get_assigned_permission_sets
```

### 15.2.58 get\_available\_permission\_sets

**Description:** Retrieves a list of the currently available Permission Sets

**Class:** cumulusci.tasks.preflight.licenses.GetAvailablePermissionSets

#### Command Syntax

```
$ cci task run get_available_permission_sets
```

### 15.2.59 get\_existing\_record\_types

**Description:** Retrieves all Record Types in the org as a dict, with sObject names as keys and lists of Developer Names as values.

**Class:** cumulusci.tasks.preflight.recordtypes.CheckSObjectRecordTypes

## Command Syntax

```
$ cci task run get_existing_record_types
```

### 15.2.60 get\_existing\_sites

**Description:** Retrieves a list of any existing Experience Cloud site names in the org.

**Class:** cumulusci.tasks.salesforce.ListCommunities

Lists Communities for the current org via the Connect API.

## Command Syntax

```
$ cci task run get_existing_sites
```

### 15.2.61 github\_parent\_pr\_notes

**Description:** Merges the description of a child pull request to the respective parent’s pull request (if one exists).

**Class:** cumulusci.tasks.release\_notes.task.ParentPullRequestNotes

Aggregate change notes from child pull request(s) to a corresponding parent pull request.

When given the `branch_name` option, this task will: (1) check if the base branch of the corresponding pull request starts with the feature branch prefix and if so (2) attempt to query for a pull request corresponding to this parent feature branch. (3) if a pull request isn’t found, the task exits and no actions are taken.

If the `build_notes_label` is present on the pull request, then all notes from the child pull request are aggregated into the parent pull request. if the `build_notes_label` is not detected on the parent pull request then a link to the child pull request is placed under the “Unaggregated Pull Requests” header.

If you have a pull request on branch `feature/myFeature` that you would like to rebuild notes for use the `branch_name` and `force` options:

```
cci task run github_parent_pr_notes --branch-name feature/myFeature --force True
```

## Command Syntax

```
$ cci task run github_parent_pr_notes
```

## Options

**--branch\_name** **BRANCHNAME** *Required*

Name of branch to check for parent status, and if so, reaggregate change notes from child branches.

**--build\_notes\_label** **BUILDNOTESLABEL** *Required*

Name of the label that indicates that change notes on parent pull requests should be reaggregated when a child branch pull request is created.

**--force** **FORCE** *Optional*

force rebuilding of change notes from child branches in the given branch.

### 15.2.62 github\_clone\_tag

**Description:** Clones a github tag under a new name.

**Class:** cumulusci.tasks.github.CloneTag

#### Command Syntax

```
$ cci task run github_clone_tag
```

#### Options

**--src\_tag SRCTAG** *Required*

The source tag to clone. Ex: beta/1.0-Beta\_2

**--tag TAG** *Required*

The new tag to create by cloning the src tag. Ex: release/1.0

### 15.2.63 github\_automerge\_main

**Description:** Merges the latest commit on the main branch into all open feature branches

**Class:** cumulusci.tasks.github.MergeBranch

Merges the most recent commit on the current branch into other branches depending on the value of source\_branch.

If source\_branch is a branch that does not start with the specified branch\_prefix, then the commit will be merged to all branches that begin with branch\_prefix and are not themselves child branches (i.e. branches don't contain '\_\_' in their name).

If source\_branch begins with branch\_prefix, then the commit is merged to all child branches of source\_branch.

#### Command Syntax

```
$ cci task run github_automerge_main
```

#### Options

**--commit COMMIT** *Optional*

The commit to merge into feature branches. Defaults to the current head commit.

**--source\_branch SOURCEBRANCH** *Optional*

The source branch to merge from. Defaults to project\_\_git\_\_default\_branch.

**--branch\_prefix BRANCHPREFIX** *Optional*

A list of prefixes of branches that should receive the merge. Defaults to project\_\_git\_\_prefix\_feature

**--skip\_future\_releases SKIPFUTURERELEASES** *Optional*

If true, then exclude branches that start with the branch prefix if they are not for the lowest release number. Defaults to True.

**--update\_future\_releases** UPDATEFUTURERELEASES *Optional*

If true, then include release branches that are not the lowest release number even if they are not child branches. Defaults to False.

## 15.2.64 github\_automerge\_feature

**Description:** Merges the latest commit on a source branch to all child branches.

**Class:** cumulusci.tasks.github.MergeBranch

Merges the most recent commit on the current branch into other branches depending on the value of source\_branch.

If source\_branch is a branch that does not start with the specified branch\_prefix, then the commit will be merged to all branches that begin with branch\_prefix and are not themselves child branches (i.e. branches don't contain '\_\_' in their name).

If source\_branch begins with branch\_prefix, then the commit is merged to all child branches of source\_branch.

### Command Syntax

```
$ cci task run github_automerge_feature
```

### Options

**--commit** COMMIT *Optional*

The commit to merge into feature branches. Defaults to the current head commit.

**--source\_branch** SOURCEBRANCH *Optional*

The source branch to merge from. Defaults to project\_\_git\_\_default\_branch.

Default: \$project\_config.repo\_branch

**--branch\_prefix** BRANCHPREFIX *Optional*

A list of prefixes of branches that should receive the merge. Defaults to project\_\_git\_\_prefix\_feature

**--skip\_future\_releases** SKIPFUTURERELEASES *Optional*

If true, then exclude branches that start with the branch prefix if they are not for the lowest release number. Defaults to True.

**--update\_future\_releases** UPDATEFUTURERELEASES *Optional*

If true, then include release branches that are not the lowest release number even if they are not child branches. Defaults to False.

## 15.2.65 github\_copy\_subtree

**Description:** Copies one or more subtrees from the project repository for a given release to a target repository, with the option to include release notes.

**Class:** cumulusci.tasks.github.publish.PublishSubtree

### Command Syntax

```
$ cci task run github_copy_subtree
```

### Options

**--repo\_url REPOURL** *Required*

The url to the public repo

**--branch BRANCH** *Required*

The branch to update in the target repo

**--version VERSION** *Optional*

(Deprecated >= 3.42.0) Only the values of 'latest' and 'latest\_beta' are acceptable. Required if 'ref' or 'tag\_name' is not set. This will override tag\_name if it is provided.

**--tag\_name TAGNAME** *Optional*

The name of the tag that should be associated with this release. Values of 'latest' and 'latest\_beta' are also allowed. Required if 'ref' or 'version' is not set.

**--ref REF** *Optional*

The git reference to publish. Takes precedence over 'version' and 'tag\_name'. Required if 'tag\_name' is not set.

**--include INCLUDE** *Optional*

A list of paths from repo root to include. Directories must end with a trailing slash.

**--renames RENAMES** *Optional*

A list of paths to rename in the target repo, given as *local: target:* pairs.

**--create\_release CREATERELEASE** *Optional*

If True, create a release in the public repo. Defaults to False

**--release\_body RELEASEBODY** *Optional*

If True, the entire release body will be published to the public repo. Defaults to False

**--dry\_run DRYRUN** *Optional*

If True, skip creating Github data. Defaults to False

### 15.2.66 github\_package\_data

**Description:** Look up 2gp package dependencies for a version id recorded in a commit status.

**Class:** cumulusci.tasks.github.commit\_status.GetPackageDataFromCommitStatus

#### Command Syntax

```
$ cci task run github_package_data
```

#### Options

**--context** **CONTEXT** *Required*

Name of the commit status context

**--version\_id** **VERSIONID** *Optional*

Package version id

### 15.2.67 github\_pull\_requests

**Description:** Lists open pull requests in project Github repository

**Class:** cumulusci.tasks.github.PullRequests

#### Command Syntax

```
$ cci task run github_pull_requests
```

### 15.2.68 github\_release

**Description:** Creates a Github release for a given managed package version number

**Class:** cumulusci.tasks.github.CreateRelease

#### Command Syntax

```
$ cci task run github_release
```

#### Options

**--version** **VERSION** *Required*

The managed package version number. Ex: 1.2

**--package\_type** **PACKAGETYPE** *Required*

The package type of the project (either 1GP or 2GP)

**--tag\_prefix** **TAGPREFIX** *Required*

The prefix to use for the release tag created in github.



**--version\_id** VERSIONID *Optional*

The SubscriberPackageVersionId (04t) associated with this release.

**--message** MESSAGE *Optional*

The message to attach to the created git tag

**--dependencies** DEPENDENCIES *Optional*

List of dependencies to record in the tag message.

**--commit** COMMIT *Optional*

Override the commit used to create the release. Defaults to the current local HEAD commit

**--resolution\_strategy** RESOLUTIONSTRATEGY *Optional*

The name of a sequence of resolution\_strategy (from project\_\_dependency\_resolutions) to apply to dynamic dependencies. Defaults to 'production'.

### 15.2.69 gather\_release\_notes

**Description:** Generates release notes by getting the latest release of each repository

**Class:** cumulusci.tasks.release\_notes.task.AllGithubReleaseNotes

#### Command Syntax

```
$ cci task run gather_release_notes
```

#### Options

**--repos** REPOS *Required*

The list of owner, repo key pairs for which to generate release notes. Ex: 'owner': SalesforceFoundation 'repo': 'NPSP'

### 15.2.70 github\_release\_notes

**Description:** Generates release notes by parsing pull request bodies of merged pull requests between two tags

**Class:** cumulusci.tasks.release\_notes.task.GithubReleaseNotes

#### Command Syntax

```
$ cci task run github_release_notes
```

## Options

**--tag TAG** *Required*

The tag to generate release notes for. Ex: release/1.2

**--last\_tag LASTTAG** *Optional*

Override the last release tag. This is useful to generate release notes if you skipped one or more releases.

**--link\_pr LINKPR** *Optional*

If True, insert link to source pull request at end of each line.

**--publish PUBLISH** *Optional*

Publish to GitHub release if True (default=False)

**--include\_empty INCLUDEEMPTY** *Optional*

If True, include links to PRs that have no release notes (default=False)

**--version\_id VERSIONID** *Optional*

The package version id used by the InstallLinksParser to add install urls

**--trial\_info TRIALINFO** *Optional*

If True, Includes trialforce template text for this product.

**--sandbox\_date SANDBOXDATE** *Optional*

The date of the sandbox release in ISO format (Will default to None)

**--production\_date PRODUCTIONDATE** *Optional*

The date of the production release in ISO format (Will default to None)

### 15.2.71 github\_release\_report

**Description:** Parses GitHub release notes to report various info

**Class:** cumulusci.tasks.github.ReleaseReport

## Command Syntax

```
$ cci task run github_release_report
```

## Options

**--date\_start DATESTART** *Optional*

Filter out releases created before this date (YYYY-MM-DD)

**--date\_end DATEEND** *Optional*

Filter out releases created after this date (YYYY-MM-DD)

**--include\_beta INCLUDEBETA** *Optional*

Include beta releases in report [default=False]

**--print PRINT** *Optional*

Print info to screen as JSON [default=False]

## 15.2.72 install\_managed

**Description:** Install the latest managed production release

**Class:** cumulusci.tasks.salesforce.InstallPackageVersion

### Command Syntax

```
$ cci task run install_managed
```

### Options

**--namespace NAMESPACE** *Required*

The namespace of the package to install. Defaults to project\_\_package\_\_namespace

**--version VERSION** *Required*

The version of the package to install. “latest” and “latest\_beta” can be used to trigger lookup via Github Releases on the repository.

Default: latest

**--name NAME** *Optional*

The name of the package to install. Defaults to project\_\_package\_\_name\_managed

**--version\_number VERSIONNUMBER** *Optional*

If installing a package using an 04t version Id, display this version number to the user and in logs. Has no effect otherwise.

**--activateRSS ACTIVATERSS** *Optional*

Deprecated. Use activate\_remote\_site\_settings instead.

**--retries RETRIES** *Optional*

Number of retries (default=5)

**--retry\_interval RETRYINTERVAL** *Optional*

Number of seconds to wait before the next retry (default=5),

**--retry\_interval\_add RETRYINTERVALADD** *Optional*

Number of seconds to add before each retry (default=30),

**--security\_type SECURITYTYPE** *Optional*

Which Profiles to install packages for (FULL = all profiles, NONE = admins only, PUSH = no profiles, CUSTOM = custom profiles). Defaults to FULL.

**--name\_conflict\_resolution NAMECONFLICTRESOLUTION** *Optional*

Specify how to resolve name conflicts when installing an Unlocked Package. Available values are Block and RenameMetadata. Defaults to Block.

**--activate\_remote\_site\_settings** **ACTIVATEREMOTESITESETTINGS** *Optional*

Activate Remote Site Settings when installing a package. Defaults to True.

**--password** **PASSWORD** *Optional*

The installation key for the managed package.

### 15.2.73 install\_managed\_beta

**Description:** Installs the latest managed beta release

**Class:** cumulusci.tasks.salesforce.InstallPackageVersion

#### Command Syntax

```
$ cci task run install_managed_beta
```

#### Options

**--namespace** **NAMESPACE** *Required*

The namespace of the package to install. Defaults to project\_\_package\_\_namespace

**--version** **VERSION** *Required*

The version of the package to install. “latest” and “latest\_beta” can be used to trigger lookup via Github Releases on the repository.

Default: latest\_beta

**--name** **NAME** *Optional*

The name of the package to install. Defaults to project\_\_package\_\_name\_managed

**--version\_number** **VERSIONNUMBER** *Optional*

If installing a package using an 04t version Id, display this version number to the user and in logs. Has no effect otherwise.

**--activateRSS** **ACTIVATERSS** *Optional*

Deprecated. Use activate\_remote\_site\_settings instead.

**--retries** **RETRIES** *Optional*

Number of retries (default=5)

**--retry\_interval** **RETRYINTERVAL** *Optional*

Number of seconds to wait before the next retry (default=5),

**--retry\_interval\_add** **RETRYINTERVALADD** *Optional*

Number of seconds to add before each retry (default=30),

**--security\_type** **SECURITYTYPE** *Optional*

Which Profiles to install packages for (FULL = all profiles, NONE = admins only, PUSH = no profiles, CUSTOM = custom profiles). Defaults to FULL.

**--name\_conflict\_resolution NAMECONFLICTRESOLUTION** *Optional*

Specify how to resolve name conflicts when installing an Unlocked Package. Available values are Block and RenameMetadata. Defaults to Block.

**--activate\_remote\_site\_settings ACTIVATEREMOTESITESETTINGS** *Optional*

Activate Remote Site Settings when installing a package. Defaults to True.

**--password PASSWORD** *Optional*

The installation key for the managed package.

## 15.2.74 list\_communities

**Description:** Lists Communities for the current org using the Connect API.

**Class:** cumulusci.tasks.salesforce.ListCommunities

Lists Communities for the current org via the Connect API.

### Command Syntax

```
$ cci task run list_communities
```

## 15.2.75 list\_community\_templates

**Description:** Prints the Community Templates available to the current org

**Class:** cumulusci.tasks.salesforce.ListCommunityTemplates

Lists Salesforce Community templates available for the current org via the Connect API.

### Command Syntax

```
$ cci task run list_community_templates
```

## 15.2.76 list\_metadata\_types

**Description:** Prints the metadata types in a project

**Class:** cumulusci.tasks.util.ListMetadataTypes

### Command Syntax

```
$ cci task run list_metadata_types
```

## Options

**--package\_xml** *PACKAGEXML* *Optional*

The project package.xml file. Defaults to <project\_root>/src/package.xml

### 15.2.77 meta\_xml\_apiversion

**Description:** Set the API version in \*meta.xml files

**Class:** cumulusci.tasks.metaxml.UpdateApi

## Command Syntax

```
$ cci task run meta_xml_apiversion
```

## Options

**--version** *VERSION* *Required*

API version number e.g. 37.0

**--dir** *DIR* *Optional*

Base directory to search for \*-meta.xml files

### 15.2.78 meta\_xml\_dependencies

**Description:** Set the version for dependent packages

**Class:** cumulusci.tasks.metaxml.UpdateDependencies

## Command Syntax

```
$ cci task run meta_xml_dependencies
```

## Options

**--dir** *DIR* *Optional*

Base directory to search for \*-meta.xml files

### 15.2.79 metadeploy\_publish

**Description:** Publish a release to the MetaDeploy web installer

**Class:** cumulusci.tasks.metadeploy.Publish

## Command Syntax

```
$ cci task run metadeploy_publish
```

## Options

**--tag TAG** *Optional*

Name of the git tag to publish

**--commit COMMIT** *Optional*

Commit hash to publish

**--plan PLAN** *Optional*

Name of the plan(s) to publish. This refers to the *plans* section of cumulusci.yml. By default, all plans will be published.

**--dry\_run DRYRUN** *Optional*

If True, print steps without publishing.

**--publish PUBLISH** *Optional*

If True, set is\_listed to True on the version. Default: False

**--labels\_path LABELSPATH** *Optional*

Path to a folder containing translations.

## 15.2.80 org\_settings

**Description:** Apply org settings from a scratch org definition file or dict

**Class:** cumulusci.tasks.salesforce.org\_settings.DeployOrgSettings

## Command Syntax

```
$ cci task run org_settings
```

## Options

**--definition\_file DEFINITIONFILE** *Optional*

sfdx scratch org definition file

**--settings SETTINGS** *Optional*

A dict of settings to apply

**--api\_version APIVERSION** *Optional*

API version used to deploy the settings

### 15.2.81 promote\_package\_version

**Description:** Promote a 2gp package so that it can be installed in a production org

**Class:** cumulusci.tasks.salesforce.promote\_package\_version.PromotePackageVersion

**Promote a Second Generation package (managed or unlocked).** Lists any 1GP dependencies that are detected, as well as any dependency packages that have not been promoted. Once promoted, the 2GP package can be installed into production orgs.

#### Command Syntax

```
$ cci task run promote_package_version
```

#### Options

**--version\_id VERSIONID** *Optional*

The SubscriberPackageVersion (04t) Id for the target package.

**--promote\_dependencies PROMOTEDEPENDENCIES** *Optional*

Automatically promote any unpromoted versions of dependency 2GP packages that are detected.

### 15.2.82 publish\_community

**Description:** Publishes a Community in the target org using the Connect API

**Class:** cumulusci.tasks.salesforce.PublishCommunity

Publish a Salesforce Community via the Connect API. Warning: This does not work with the Community Template 'VF Template' due to an existing bug in the API.

#### Command Syntax

```
$ cci task run publish_community
```

#### Options

**--name NAME** *Optional*

The name of the Community to publish.

**--community\_id COMMUNITYID** *Optional*

The id of the Community to publish.



### 15.2.83 push\_all

**Description:** Schedules a push upgrade of a package version to all subscribers

**Class:** cumulusci.tasks.push.tasks.SchedulePushOrgQuery

#### Command Syntax

```
$ cci task run push_all
```

#### Options

**--version VERSION** *Required*

The managed package version to push

**--subscriber\_where SUBSCRIBERWHERE** *Optional*

A SOQL style WHERE clause for filtering PackageSubscriber objects. Ex: OrgType = 'Sandbox'

**--min\_version MINVERSION** *Optional*

If set, no subscriber with a version lower than min\_version will be selected for push

**--metadata\_package\_id METADATAPACKAGEID** *Optional*

The MetadataPackageId (ID prefix 033) to push.

**--namespace NAMESPACE** *Optional*

The managed package namespace to push. Defaults to project\_\_package\_\_namespace.

**--start\_time STARTTIME** *Optional*

Set the start time (ISO-8601) to queue a future push. (Ex: 2021-01-01T06:00Z or 2021-01-01T06:00-08:00)  
Times with no timezone will be interpreted as UTC.

**--dry\_run DRYRUN** *Optional*

If True, log how many orgs were selected but skip creating a PackagePushRequest. Defaults to False

### 15.2.84 push\_list

**Description:** Schedules a push upgrade of a package version to all orgs listed in the specified file

**Class:** cumulusci.tasks.push.tasks.SchedulePushOrgList

#### Command Syntax

```
$ cci task run push_list
```

## Options

**--csv CSV** *Optional*

The path to a CSV file to read.

**--csv\_field\_name CSVFIELDNAME** *Optional*

The CSV field name that contains organization IDs. Defaults to 'OrganizationID'

**--orgs ORGS** *Optional*

The path to a file containing one OrgID per line.

**--version VERSION** *Optional*

The managed package version to push

**--version\_id VERSIONID** *Optional*

The MetadataPackageVersionId (ID prefix *04t*) to push

**--metadata\_package\_id METADATAPACKAGEID** *Optional*

The MetadataPackageId (ID prefix *033*) to push.

**--namespace NAMESPACE** *Optional*

The managed package namespace to push. Defaults to `project__package__namespace`.

**--start\_time STARTTIME** *Optional*

Set the start time (ISO-8601) to queue a future push. (Ex: 2021-01-01T06:00Z or 2021-01-01T06:00-08:00)  
Times with no timezone will be interpreted as UTC.

**--batch\_size BATCHSIZE** *Optional*

Break pull requests into batches of this many orgs. Defaults to 200.

## 15.2.85 push\_qa

**Description:** Schedules a push upgrade of a package version to all orgs listed in `push/orgs_qa.txt`

**Class:** `cumulusci.tasks.push.tasks.SchedulePushOrgList`

## Command Syntax

```
$ cci task run push_qa
```

## Options

**--csv CSV** *Optional*

The path to a CSV file to read.

**--csv\_field\_name CSVFIELDNAME** *Optional*

The CSV field name that contains organization IDs. Defaults to 'OrganizationID'

**--orgs ORGS** *Optional*

The path to a file containing one OrgID per line.

Default: `push/orgs_qa.txt`

**--version VERSION** *Optional*

The managed package version to push

**--version\_id VERSIONID** *Optional*

The MetadataPackageVersionId (ID prefix *04t*) to push

**--metadata\_package\_id METADATAPACKAGEID** *Optional*

The MetadataPackageId (ID prefix *033*) to push.

**--namespace NAMESPACE** *Optional*

The managed package namespace to push. Defaults to `project__package__namespace`.

**--start\_time STARTTIME** *Optional*

Set the start time (ISO-8601) to queue a future push. (Ex: 2021-01-01T06:00Z or 2021-01-01T06:00-08:00)  
Times with no timezone will be interpreted as UTC.

**--batch\_size BATCHSIZE** *Optional*

Break pull requests into batches of this many orgs. Defaults to 200.

## 15.2.86 push\_sandbox

**Description:** Schedules a push upgrade of a package version to sandbox orgs

**Class:** `cumulusci.tasks.push.tasks.SchedulePushOrgQuery`

### Command Syntax

```
$ cci task run push_sandbox
```

### Options

**--version VERSION** *Required*

The managed package version to push

**--subscriber\_where SUBSCRIBERWHERE** *Optional*

A SOQL style WHERE clause for filtering PackageSubscriber objects. Ex: `OrgType = 'Sandbox'`

Default: `OrgType = 'Sandbox'`

**--min\_version MINVERSION** *Optional*

If set, no subscriber with a version lower than `min_version` will be selected for push

**--metadata\_package\_id METADATAPACKAGEID** *Optional*

The MetadataPackageId (ID prefix *033*) to push.

**--namespace NAMESPACE** *Optional*

The managed package namespace to push. Defaults to `project__package__namespace`.

**--start\_time STARTTIME** *Optional*

Set the start time (ISO-8601) to queue a future push. (Ex: 2021-01-01T06:00Z or 2021-01-01T06:00-08:00)  
Times with no timezone will be interpreted as UTC.

**--dry\_run** **DRYRUN** *Optional*

If True, log how many orgs were selected but skip creating a PackagePushRequest. Defaults to False

### 15.2.87 push\_trial

**Description:** Schedules a push upgrade of a package version to Trialforce Template orgs listed in push/orgs\_trial.txt

**Class:** cumulusci.tasks.push.tasks.SchedulePushOrgList

#### Command Syntax

```
$ cci task run push_trial
```

#### Options

**--csv** **CSV** *Optional*

The path to a CSV file to read.

**--csv\_field\_name** **CSVFIELDNAME** *Optional*

The CSV field name that contains organization IDs. Defaults to 'OrganizationID'

**--orgs** **ORGS** *Optional*

The path to a file containing one OrgID per line.

Default: push/orgs\_trial.txt

**--version** **VERSION** *Optional*

The managed package version to push

**--version\_id** **VERSIONID** *Optional*

The MetadataPackageVersionId (ID prefix *04t*) to push

**--metadata\_package\_id** **METADATAPACKAGEID** *Optional*

The MetadataPackageId (ID prefix *033*) to push.

**--namespace** **NAMESPACE** *Optional*

The managed package namespace to push. Defaults to project\_\_package\_\_namespace.

**--start\_time** **STARTTIME** *Optional*

Set the start time (ISO-8601) to queue a future push. (Ex: 2021-01-01T06:00Z or 2021-01-01T06:00-08:00)  
Times with no timezone will be interpreted as UTC.

**--batch\_size** **BATCHSIZE** *Optional*

Break pull requests into batches of this many orgs. Defaults to 200.

### 15.2.88 push\_failure\_report

**Description:** Produce a CSV report of the failed and otherwise anomalous push jobs.

**Class:** cumulusci.tasks.push.pushfails.ReportPushFailures

#### Command Syntax

```
$ cci task run push_failure_report
```

#### Options

**--request\_id REQUESTID** *Required*

PackagePushRequest ID for the request you need to report on.

**--result\_file RESULTFILE** *Optional*

Path to write a CSV file with the results. Defaults to 'push\_fails.csv'.

**--ignore\_errors IGNOREERRORS** *Optional*

List of ErrorTitle and ErrorType values to omit from the report

Default: ['Salesforce Subscription Expired', 'Package Uninstalled']

### 15.2.89 query

**Description:** Queries the connected org

**Class:** cumulusci.tasks.salesforce.SOQLQuery

#### Command Syntax

```
$ cci task run query
```

#### Options

**--object OBJECT** *Required*

The object to query

**--query QUERY** *Required*

A valid bulk SOQL query for the object

**--result\_file RESULTFILE** *Required*

The name of the csv file to write the results to

### 15.2.90 retrieve\_packaged

**Description:** Retrieves the packaged metadata from the org

**Class:** cumulusci.tasks.salesforce.RetrievePackaged

#### Command Syntax

```
$ cci task run retrieve_packaged
```

#### Options

**--path PATH** *Required*

The path to write the retrieved metadata

Default: packaged

**--package PACKAGE** *Required*

The package name to retrieve. Defaults to project\_\_package\_\_name

**--namespace\_strip NAMESPACESTRIP** *Optional*

If set, all namespace prefixes for the namespace specified are stripped from files and filenames

**--namespace\_tokenize NAMESPACETOKENIZE** *Optional*

If set, all namespace prefixes for the namespace specified are replaced with tokens for use with namespace\_inject

**--namespaced\_org NAMESPACEORG** *Optional*

If True, the tokens `%%%NAMESPACEED_ORG%%%` and `__NAMESPACEED_ORG__` will get replaced with the namespace. The default is false causing those tokens to get stripped and replaced with an empty string. Set this if deploying to a namespaced scratch org or packaging org.

**--api\_version APIVERSION** *Optional*

Override the default api version for the retrieve. Defaults to project\_\_package\_\_api\_version

### 15.2.91 retrieve\_src

**Description:** Retrieves the packaged metadata into the src directory

**Class:** cumulusci.tasks.salesforce.RetrievePackaged

#### Command Syntax

```
$ cci task run retrieve_src
```

## Options

### **--path PATH** *Required*

The path to write the retrieved metadata

Default: src

### **--package PACKAGE** *Required*

The package name to retrieve. Defaults to project\_\_package\_\_name

### **--namespace\_strip NAMESPACESTRIP** *Optional*

If set, all namespace prefixes for the namespace specified are stripped from files and filenames

### **--namespace\_tokenize NAMESPACETOKENIZE** *Optional*

If set, all namespace prefixes for the namespace specified are replaced with tokens for use with namespace\_inject

### **--namespaced\_org NAMESPACEDORG** *Optional*

If True, the tokens %%%NAMESPACED\_ORG%% and \_\_NAMESPACED\_ORG\_\_ will get replaced with the namespace. The default is false causing those tokens to get stripped and replaced with an empty string. Set this if deploying to a namespaced scratch org or packaging org.

### **--api\_version APIVERSION** *Optional*

Override the default api version for the retrieve. Defaults to project\_\_package\_\_api\_version

## 15.2.92 retrieve\_unpackaged

**Description:** Retrieve the contents of a package.xml file.

**Class:** cumulusci.tasks.salesforce.RetrieveUnpackaged

## Command Syntax

```
$ cci task run retrieve_unpackaged
```

## Options

### **--path PATH** *Required*

The path to write the retrieved metadata

### **--package\_xml PACKAGEXML** *Required*

The path to a package.xml manifest to use for the retrieve.

### **--namespace\_strip NAMESPACESTRIP** *Optional*

If set, all namespace prefixes for the namespace specified are stripped from files and filenames

### **--namespace\_tokenize NAMESPACETOKENIZE** *Optional*

If set, all namespace prefixes for the namespace specified are replaced with tokens for use with namespace\_inject

### **--namespaced\_org NAMESPACEDORG** *Optional*

If True, the tokens %%%NAMESPACED\_ORG%% and \_\_NAMESPACED\_ORG\_\_ will get replaced with the namespace. The default is false causing those tokens to get stripped and replaced with an empty string. Set this if deploying to a namespaced scratch org or packaging org.

**--api\_version APIVERSION** *Optional*

Override the default api version for the retrieve. Defaults to project\_\_package\_\_api\_version

### 15.2.93 list\_changes

**Description:** List the changes from a scratch org

**Class:** cumulusci.tasks.salesforce.sourcetracking.ListChanges

#### Command Syntax

```
$ cci task run list_changes
```

#### Options

**--include INCLUDE** *Optional*

A comma-separated list of strings. Components will be included if one of these strings is part of either the metadata type or name. Example: `-o include CustomField,Admin` matches both `CustomField: Favorite_Color__c` and `Profile: Admin`

**--types TYPES** *Optional*

A comma-separated list of metadata types to include.

**--exclude EXCLUDE** *Optional*

Exclude changed components matching this string.

**--snapshot SNAPSHOT** *Optional*

If True, all matching items will be set to be ignored at their current revision number. This will exclude them from the results unless a new edit is made.

### 15.2.94 retrieve\_changes

**Description:** Retrieve changed components from a scratch org

**Class:** cumulusci.tasks.salesforce.sourcetracking.RetrieveChanges

#### Command Syntax

```
$ cci task run retrieve_changes
```



## Options

**--include INCLUDE** *Optional*

A comma-separated list of strings. Components will be included if one of these strings is part of either the metadata type or name. Example: `-o include CustomField,Admin` matches both `CustomField: Favorite_Color__c` and `Profile: Admin`

**--types TYPES** *Optional*

A comma-separated list of metadata types to include.

**--exclude EXCLUDE** *Optional*

Exclude changed components matching this string.

**--snapshot SNAPSHOT** *Optional*

If True, all matching items will be set to be ignored at their current revision number. This will exclude them from the results unless a new edit is made.

**--path PATH** *Optional*

The path to write the retrieved metadata

**--api\_version APIVERSION** *Optional*

Override the default api version for the retrieve. Defaults to `project__package__api_version`

**--namespace\_tokenize NAMESPACETOKENIZE** *Optional*

If set, all namespace prefixes for the namespace specified are replaced with tokens for use with `namespace_inject`

### 15.2.95 retrieve\_qa\_config

**Description:** Retrieves the current changes in the scratch org into `unpackaged/config/qa`

**Class:** `cumulusci.tasks.salesforce.sourcetracking.RetrieveChanges`

## Command Syntax

```
$ cci task run retrieve_qa_config
```

## Options

**--include INCLUDE** *Optional*

A comma-separated list of strings. Components will be included if one of these strings is part of either the metadata type or name. Example: `-o include CustomField,Admin` matches both `CustomField: Favorite_Color__c` and `Profile: Admin`

**--types TYPES** *Optional*

A comma-separated list of metadata types to include.

**--exclude EXCLUDE** *Optional*

Exclude changed components matching this string.

**--snapshot SNAPSHOT** *Optional*

If True, all matching items will be set to be ignored at their current revision number. This will exclude them from the results unless a new edit is made.

**--path PATH** *Optional*

The path to write the retrieved metadata

Default: unpackaged/config/qa

**--api\_version APIVERSION** *Optional*

Override the default api version for the retrieve. Defaults to project\_\_package\_\_api\_version

**--namespace\_tokenize NAMESPACETOKENIZE** *Optional*

If set, all namespace prefixes for the namespace specified are replaced with tokens for use with namespace\_inject

Default: \$project\_config.project\_\_package\_\_namespace

## 15.2.96 set\_field\_help\_text

**Description:** Sets specified fields' Help Text values.

**Class:** cumulusci.tasks.metadata\_etl.help\_text.SetFieldHelpText

### Command Syntax

```
$ cci task run set_field_help_text
```

### Options

**--fields FIELDS** *Required*

List of object fields to affect, in Object\_\_c.Field\_\_c form.

**--overwrite OVERWRITE** *Optional*

If set to True, overwrite any differing Help Text found on the field. By default, Help Text is set only if it is blank.

**--api\_names APINAMES** *Optional*

List of API names of entities to affect

**--managed MANAGED** *Optional*

If False, changes namespace\_inject to replace tokens with a blank string

**--namespace\_inject NAMESPACEINJECT** *Optional*

If set, the namespace tokens in files and filenames are replaced with the namespace's prefix

Default: \$project\_config.project\_\_package\_\_namespace

**--api\_version APIVERSION** *Optional*

Metadata API version to use, if not project\_\_package\_\_api\_version.

## 15.2.97 snapshot\_changes

**Description:** Tell SFDX source tracking to ignore previous changes in a scratch org

**Class:** cumulusci.tasks.salesforce.sourcetracking.SnapshotChanges

### Command Syntax

```
$ cci task run snapshot_changes
```

## 15.2.98 snowfakery

**Description:** Generate and load data from a Snowfakery recipe

**Class:** cumulusci.tasks.bulkdata.snowfakery.Snowfakery

Do a data load with Snowfakery.

All options are optional.

The most commonly supplied options are *recipe* and one of the three *run\_until\_...* options.

### Command Syntax

```
$ cci task run snowfakery
```

### Options

**--recipe *RECIPE*** *Required*

Path to a Snowfakery recipe file determining what data to generate and load.

Default: datasets/recipe.yml

**--run\_until\_records\_in\_org *RUNUNTILRECORDSINORG***

*Optional*

<subject>:<count>

Run the recipe repeatedly until the count of <subject> in the org matches the given <count>.

For example, *--run\_until\_records\_in\_org Account:50\_000* means:

Count the Account records in the org. Let's say the number is 20,000. Thus, we must run the recipe over and over again until we generate 30,000 new Account records. If the recipe also generates e.g. Contacts, Opportunities or whatever else, it generates the appropriate number of them to match.

Underscores are allowed but optional in big numbers: 2000000 is the same as 2\_000\_000.

**--run\_until\_records\_loaded *RUNUNTILRECORDSLOADED***

*Optional*

<subject>:<count>

Run the recipe repeatedly until the number of records of <subject> uploaded in this task execution matches <count>.

For example, `--run_until_records_loaded Account:50_000` means:

Run the recipe over and over again until we generate 50\_000 new Account records. If the recipe also generates e.g. Contacts, Opportunities or whatever else, it generates the appropriate number of them to match.

**--run\_until\_recipe\_repeated RUNUNTILRECIPEPEATED** *Optional*

Run the recipe <count> times, no matter what data is already in the org.

For example, `--run_until_recipe_repeated 50_000` means run the recipe 50\_000 times.

**--working\_directory WORKINGDIRECTORY** *Optional*

Path for temporary / working files

**--loading\_rules LOADINGRULES** *Optional*

Path to .load.yml file containing rules to use to load the file. Defaults to <recipe\_name>.load.yml. Multiple files can be comma separated.

**--bulk\_mode BULKMODE** *Optional*

Set to Serial to force serial mode on all jobs. Parallel is the default.

**--drop\_missing\_schema DROPMISSINGSCHEMA** *Optional*

Set to True to skip any missing objects or fields instead of stopping with an error.

**--num\_processes NUMPROCESSES** *Optional*

Number of data generating processes. Defaults to matching the number of CPUs.

**--ignore\_row\_errors IGNOREROWERRORS** *Optional*

Boolean: should we continue loading even after running into row errors? Defaults to False.

## 15.2.99 revert\_managed\_src

**Description:** Reverts the changes from create\_managed\_src

**Class:** cumulusci.tasks.metadata.managed\_src.RevertManagedSrc

### Command Syntax

```
$ cci task run revert_managed_src
```

### Options

**--path PATH** *Required*

The path containing metadata to process for managed deployment

Default: src

**--revert\_path REVERTPATH** *Required*

The path to copy the original metadata to for the revert call

Default: src.orig

### 15.2.100 revert\_unmanaged\_ee\_src

**Description:** Reverts the changes from create\_unmanaged\_ee\_src

**Class:** cumulusci.tasks.metadata.ee\_src.RevertUnmanagedEESrc

#### Command Syntax

```
$ cci task run revert_unmanaged_ee_src
```

#### Options

**--path PATH** *Required*

The path containing metadata to process for managed deployment

Default: src

**--revert\_path REVERTPATH** *Required*

The path to copy the original metadata to for the revert call

Default: src.orig

### 15.2.101 robot

**Description:** Runs a Robot Framework test from a .robot file

**Class:** cumulusci.tasks.robotframework.Robot

Runs Robot test cases using a browser, if necessary and stores its results in a directory. The path to the directory can be retrieved from the robot\_outputdir return variable. Command Syntax \_\_\_\_\_

```
$ cci task run robot
```

#### Options

**--suites SUITES** *Required*

Paths to test case files/directories to be executed similarly as when running the robot command on the command line. Defaults to “tests” to run all tests in the tests directory

Default: tests

**--test TEST** *Optional*

Run only tests matching name patterns. Can be comma separated and use robot wildcards like \*

**--include INCLUDE** *Optional*

Includes tests with a given tag pattern

**--exclude EXCLUDE** *Optional*

Excludes tests with a given tag pattern. Excluded tests will not appear in the logs and reports.

**--skip SKIP** *Optional*

Do not run tests with the given tag pattern. Similar to ‘exclude’, but skipped tests will appear in the logs and reports with the status of SKIP.

**--vars VARS** *Optional*

Pass values to override variables in the format VAR1:foo,VAR2:bar

**--xunit XUNIT** *Optional*

Set an XUnit format output file for test results

**--sources SOURCES** *Optional*

List of sources defined in cumulusci.yml that are required by the robot task.

**--options OPTIONS** *Optional*

A dictionary of options to robot.run method. In simple cases this can be specified on the comand line using name:value,name:value syntax. More complex cases can be specified in cumulusci.yml using YAML dictionary syntax.

**--name NAME** *Optional*

Sets the name of the top level test suite

**--pdb PDB** *Optional*

If true, run the Python debugger when tests fail.

**--verbose VERBOSE** *Optional*

If true, log each keyword as it runs.

**--debug DEBUG** *Optional*

If true, enable the *breakpoint* keyword to enable the robot debugger

**--ordering ORDERING** *Optional*

Path to a file which defines the order in which parallel tests are run. This maps directly to the pabot option of the same name. It is ignored unless the processes argument is set to 2 or greater.

**--processes PROCESSES** *Optional*

*experimental* Number of processes to use for running tests in parallel. If this value is set to a number larger than 1 the tests will run using the open source tool pabot rather than robotframework. For example, -o parallel 2 will run half of the tests in one process and half in another. If not provided, all tests will run in a single process using the standard robot test runner. See <https://pabot.org/> for more information on pabot.

**--testlevelsplrit TESTLEVELSPLIT** *Optional*

If true, split parallel execution at the test level rather than the suite level. This option is ignored unless the processes option is set to 2 or greater. Note: this option requires a boolean value even though the pabot option of the same name does not.

## 15.2.102 robot\_libdoc

**Description:** Generates documentation for project keyword files

**Class:** cumulusci.tasks.robotframework.RobotLibDoc

## Command Syntax

```
$ cci task run robot_libdoc
```

## Options

### **--path PATH** *Required*

The path to one or more keyword libraries to be documented. The path can be single a python file, a .robot file, a python module (eg: cumulusci.robotframework.Salesforce) or a comma separated list of any of those. Glob patterns are supported for filenames (eg: robot/SAL/doc/\*PageObject.py). The order of the files will be preserved in the generated documentation. The result of pattern expansion will be sorted

### **--output OUTPUT** *Required*

The output file where the documentation will be written

Default: Keywords.html

### **--title TITLE** *Optional*

A string to use as the title of the generated output

Default: \$project\_config.project\_\_package\_\_name

## 15.2.103 robot\_lint

**Description:** Static analysis tool for robot framework files

**Class:** cumulusci.tasks.robotframework.RobotLint

The robot\_lint task performs static analysis on one or more .robot and .resource files. Each line is parsed, and the result passed through a series of rules. Rules can issue warnings or errors about each line.

If any errors are reported, the task will exit with a non-zero status.

When a rule has been violated, a line will appear on the output in the following format:

```
<severity>: <line>, <character>: <description> (<name>)
```

- <severity> will be either W for warning or E for error
- <line> is the line number where the rule was triggered
- <character> is the character where the rule was triggered, or 0 if the rule applies to the whole line
- <description> is a short description of the issue
- <name> is the name of the rule that raised the issue

Note: the rule name can be used with the ignore, warning, error, and configure options.

Some rules are configurable, and can be configured with the *configure* option. This option takes a list of values in the form <rule>:<value>,<rule>:<value>,etc. For example, to set the line length for the LineTooLong rule you can use '-o configure LineTooLong:80'. If a rule is configurable, it will show the configuration options in the documentation for that rule

The filename will be printed once before any errors or warnings for that file. The filename is preceeded by +

Example Output:

```
+ example.robot
W: 2, 0: No suite documentation (RequireSuiteDocumentation)
E: 30, 0: No testcase documentation (RequireTestDocumentation)
```

To see a list of all configured rules, set the ‘list’ option to True:

```
cci task run robot_lint -o list True
```

## Command Syntax

```
$ cci task run robot_lint
```

## Options

**--configure CONFIGURE** *Optional*

List of rule configuration values, in the form of rule:args.

**--ignore IGNORE** *Optional*

List of rules to ignore. Use ‘all’ to ignore all rules

**--error ERROR** *Optional*

List of rules to treat as errors. Use ‘all’ to affect all rules.

**--warning WARNING** *Optional*

List of rules to treat as warnings. Use ‘all’ to affect all rules.

**--list LIST** *Optional*

If option is True, print a list of known rules instead of processing files.

**--path PATH** *Optional*

The path to one or more files or folders. If the path includes wildcard characters, they will be expanded. If not provided, the default will be to process all files under robot/<project name>

### 15.2.104 robot\_testdoc

**Description:** Generates html documentation of your Robot test suite and writes to tests/test\_suite.

**Class:** cumulusci.tasks.robotframework.RobotTestDoc

## Command Syntax

```
$ cci task run robot_testdoc
```



## Options

### **--path PATH** *Required*

The path containing .robot test files

Default: tests

### **--output OUTPUT** *Required*

The output html file where the documentation will be written

Default: tests/test\_suites.html

## 15.2.105 run\_tests

**Description:** Runs all apex tests

**Class:** cumulusci.tasks.apex.testrunner.RunApexTests

## Command Syntax

```
$ cci task run run_tests
```

## Options

### **--test\_name\_match TESTNAMEMATCH** *Required*

Pattern to find Apex test classes to run (“%” is wildcard). Defaults to project\_\_test\_\_name\_match from project config. Comma-separated list for multiple patterns.

### **--test\_name\_exclude TESTNAMEEXCLUDE** *Optional*

Query to find Apex test classes to exclude (“%” is wildcard). Defaults to project\_\_test\_\_name\_exclude from project config. Comma-separated list for multiple patterns.

### **--namespace NAMESPACE** *Optional*

Salesforce project namespace. Defaults to project\_\_package\_\_namespace

### **--managed MANAGED** *Optional*

If True, search for tests in the namespace only. Defaults to False

### **--poll\_interval POLLINTERVAL** *Optional*

Seconds to wait between polling for Apex test results.

### **--junit\_output JUNITOUTPUT** *Optional*

File name for JUnit output. Defaults to test\_results.xml

### **--json\_output JSONOUTPUT** *Optional*

File name for json output. Defaults to test\_results.json

### **--retry\_failures RETRYFAILURES** *Optional*

A list of regular expression patterns to match against test failures. If failures match, the failing tests are retried in serial mode.

**--retry\_always** **RETRYALWAYS** *Optional*

By default, all failures must match `retry_failures` to perform a retry. Set `retry_always` to `True` to retry all failed tests if any failure matches.

**-o required\_org\_code\_coverage\_percent** **PERCENTAGE** *Optional*

Require at least X percent code coverage across the org following the test run.

**--verbose** **VERBOSE** *Optional*

By default, only failures get detailed output. Set `verbose` to `True` to see all passed test methods.

### 15.2.106 `set_duplicate_rule_status`

**Description:** Sets the active status of Duplicate Rules.

**Class:** `cumulusci.tasks.metadata_etl.SetDuplicateRuleStatus`

#### Command Syntax

```
$ cci task run set_duplicate_rule_status
```

#### Options

**--active** **ACTIVE** *Required*

Boolean value, set the Duplicate Rule to either active or inactive

**--api\_names** **APINAMES** *Optional*

List of API names of entities to affect

**--managed** **MANAGED** *Optional*

If `False`, changes `namespace_inject` to replace tokens with a blank string

**--namespace\_inject** **NAMESPACEINJECT** *Optional*

If set, the namespace tokens in files and filenames are replaced with the namespace's prefix

Default: `$project_config.project__package__namespace`

**--api\_version** **APIVERSION** *Optional*

Metadata API version to use, if not `project__package__api_version`.

### 15.2.107 `set_organization_wide_defaults`

**Description:** Sets the Organization-Wide Defaults for specific sObjects, and waits for sharing recalculation to complete.

**Class:** `cumulusci.tasks.metadata_etl.SetOrgWideDefaults`

## Command Syntax

```
$ cci task run set_organization_wide_defaults
```

## Options

**--org\_wide\_defaults ORGWIDEDEFAULTS** *Required*

The target Organization-Wide Defaults, organized as a list with each element containing the keys `api_name`, `internal_sharing_model`, and `external_sharing_model`. NOTE: you must have External Sharing Model turned on in Sharing Settings to use the latter feature.

**--timeout TIMEOUT** *Optional*

The max amount of time to wait in seconds

**--api\_names APINAMES** *Optional*

List of API names of entities to affect

**--managed MANAGED** *Optional*

If False, changes `namespace_inject` to replace tokens with a blank string

**--namespace\_inject NAMESPACEINJECT** *Optional*

If set, the namespace tokens in files and filenames are replaced with the namespace's prefix

Default: `$project_config.project__package__namespace`

**--api\_version APIVERSION** *Optional*

Metadata API version to use, if not `project__package__api_version`.

## 15.2.108 uninstall\_managed

**Description:** Uninstalls the managed version of the package

**Class:** `cumulusci.tasks.salesforce.UninstallPackage`

## Command Syntax

```
$ cci task run uninstall_managed
```

## Options

**--namespace NAMESPACE** *Required*

The namespace of the package to uninstall. Defaults to `project__package__namespace`

**--purge\_on\_delete PURGEONDELETE** *Required*

Sets the `purgeOnDelete` option for the deployment. Defaults to `True`

### 15.2.109 uninstall\_packaged

**Description:** Uninstalls all deleteable metadata in the package in the target org

**Class:** cumulusci.tasks.salesforce.UninstallPackaged

#### Command Syntax

```
$ cci task run uninstall_packaged
```

#### Options

**--package PACKAGE** *Required*

The package name to uninstall. All metadata from the package will be retrieved and a custom destructiveChanges.xml package will be constructed and deployed to delete all deleteable metadata from the package. Defaults to project\_\_package\_\_name

**--purge\_on\_delete PURGEONDELETE** *Required*

Sets the purgeOnDelete option for the deployment. Defaults to True

**--dry\_run DRYRUN** *Optional*

Perform a dry run of the operation without actually deleting any components, and display the components that would be deleted.

### 15.2.110 uninstall\_packaged\_incremental

**Description:** Deletes any metadata from the package in the target org not in the local workspace

**Class:** cumulusci.tasks.salesforce.UninstallPackagedIncremental

#### Command Syntax

```
$ cci task run uninstall_packaged_incremental
```

#### Options

**--path PATH** *Required*

The local path to compare to the retrieved packaged metadata from the org. Defaults to src

**--package PACKAGE** *Required*

The package name to uninstall. All metadata from the package will be retrieved and a custom destructiveChanges.xml package will be constructed and deployed to delete all deleteable metadata from the package. Defaults to project\_\_package\_\_name

**--purge\_on\_delete PURGEONDELETE** *Required*

Sets the purgeOnDelete option for the deployment. Defaults to True

**--ignore IGNORE** *Optional*

Components to ignore in the org and not try to delete. Mapping of component type to a list of member names.

**--ignore\_types IGNORETYPES** *Optional*

List of component types to ignore in the org and not try to delete. Defaults to ['RecordType', 'CustomObject-Translation']

**--dry\_run DRYRUN** *Optional*

Perform a dry run of the operation without actually deleting any components, and display the components that would be deleted.

**15.2.111 uninstall\_src**

**Description:** Uninstalls all metadata in the local src directory

**Class:** cumulusci.tasks.salesforce.UninstallLocal

**Command Syntax**

```
$ cci task run uninstall_src
```

**Options****--path PATH** *Required*

The path to the metadata source to be deployed

Default: src

**--unmanaged UNMANAGED** *Optional*

If True, changes namespace\_inject to replace tokens with a blank string

**--namespace\_inject NAMESPACEINJECT** *Optional*

If set, the namespace tokens in files and filenames are replaced with the namespace's prefix

**--namespace\_strip NAMESPACESTRIP** *Optional*

If set, all namespace prefixes for the namespace specified are stripped from files and filenames

**--check\_only CHECKONLY** *Optional*

If True, performs a test deployment (validation) of components without saving the components in the target org

**--test\_level TESTLEVEL** *Optional*

Specifies which tests are run as part of a deployment. Valid values: NoTestRun, RunLocalTests, RunAllTestsInOrg, RunSpecifiedTests.

**--specified\_tests SPECIFIEDTESTS** *Optional*

Comma-separated list of test classes to run upon deployment. Applies only with test\_level set to RunSpecifiedTests.

**--static\_resource\_path STATICRESOURCEPATH** *Optional*

The path where decompressed static resources are stored. Any subdirectories found will be zipped and added to the staticresources directory of the build.

**--namespaced\_org NAMESPACEORG** *Optional*

If True, the tokens `%%NAMESPACE_ORG%%` and `__NAMESPACE_ORG__` will get replaced with the namespace. The default is false causing those tokens to get stripped and replaced with an empty string. Set this if deploying to a namespaced scratch org or packaging org.

**--clean\_meta\_xml CLEANMETAXML** *Optional*

Defaults to True which strips the `<packageVersions/>` element from all meta.xml files. The packageVersion element gets added automatically by the target org and is set to whatever version is installed in the org. To disable this, set this option to False

**--purge\_on\_delete PURGEONDELETE** *Optional*

Sets the purgeOnDelete option for the deployment. Defaults to True

**--dry\_run DRYRUN** *Optional*

Perform a dry run of the operation without actually deleting any components, and display the components that would be deleted.

## 15.2.112 uninstall\_pre

**Description:** Uninstalls the unpackaged/pre bundles

**Class:** cumulusci.tasks.salesforce.UninstallLocalBundles

### Command Syntax

```
$ cci task run uninstall_pre
```

### Options

**--path PATH** *Required*

The path to the metadata source to be deployed

Default: unpackaged/pre

**--unmanaged UNMANAGED** *Optional*

If True, changes namespace\_inject to replace tokens with a blank string

**--namespace\_inject NAMESPACEINJECT** *Optional*

If set, the namespace tokens in files and filenames are replaced with the namespace's prefix

**--namespace\_strip NAMESPACESTRIP** *Optional*

If set, all namespace prefixes for the namespace specified are stripped from files and filenames

**--check\_only CHECKONLY** *Optional*

If True, performs a test deployment (validation) of components without saving the components in the target org

**--test\_level TESTLEVEL** *Optional*

Specifies which tests are run as part of a deployment. Valid values: NoTestRun, RunLocalTests, RunAllTestsInOrg, RunSpecifiedTests.

**--specified\_tests SPECIFIEDTESTS** *Optional*

Comma-separated list of test classes to run upon deployment. Applies only with test\_level set to RunSpecifiedTests.

**--static\_resource\_path STATICRESOURCEPATH** *Optional*

The path where decompressed static resources are stored. Any subdirectories found will be zipped and added to the staticresources directory of the build.

**--namespaced\_org NAMESPACEDORG** *Optional*

If True, the tokens `%%NAMESPACED_ORG%%` and `__NAMESPACED_ORG__` will get replaced with the namespace. The default is false causing those tokens to get stripped and replaced with an empty string. Set this if deploying to a namespaced scratch org or packaging org.

**--clean\_meta\_xml CLEANMETAXML** *Optional*

Defaults to True which strips the `<packageVersions/>` element from all meta.xml files. The packageVersion element gets added automatically by the target org and is set to whatever version is installed in the org. To disable this, set this option to False

**--purge\_on\_delete PURGEONDELETE** *Optional*

Sets the purgeOnDelete option for the deployment. Defaults to True

**--dry\_run DRYRUN** *Optional*

Perform a dry run of the operation without actually deleting any components, and display the components that would be deleted.

## 15.2.113 uninstall\_post

**Description:** Uninstalls the unpackaged/post bundles

**Class:** cumulusci.tasks.salesforce.UninstallLocalNamespacedBundles

### Command Syntax

```
$ cci task run uninstall_post
```

### Options

**--path PATH** *Required*

The path to a directory containing the metadata bundles (subdirectories) to uninstall

Default: unpackaged/post

**--filename\_token FILENAMETOKEN** *Required*

The path to the parent directory containing the metadata bundles directories

Default: `__NAMESPACE__`

**--purge\_on\_delete PURGEONDELETE** *Required*

Sets the purgeOnDelete option for the deployment. Defaults to True

**--managed MANAGED** *Optional*

If True, will insert the actual namespace prefix. Defaults to False or no namespace

**--namespace** *NAMESPACE* *Optional*

The namespace to replace the token with if in managed mode. Defaults to `project__package__namespace`

### 15.2.114 `unschedule_apex`

**Description:** Unschedule all scheduled apex jobs (CronTriggers).

**Class:** `cumulusci.tasks.apex.anon.AnonymousApexTask`

Use the *apex* option to run a string of anonymous Apex. Use the *path* option to run anonymous Apex from a file. Or use both to concatenate the string to the file contents.

#### Command Syntax

```
$ cci task run unschedule_apex
```

#### Options

**--path** *PATH* *Optional*

The path to an Apex file to run.

**--apex** *APEX* *Optional*

A string of Apex to run (after the file, if specified).

Default: `for (CronTrigger t : [SELECT Id FROM CronTrigger]) { System.abortJob(t.Id); }`

**--managed** *MANAGED* *Optional*

If True, will insert the project's namespace prefix. Defaults to False or no namespace.

**--namespaced** *NAMESPACED* *Optional*

If True, the tokens `%%%NAMESPACED_RT%%%` and `%%%namespaced%%%` will get replaced with the namespace prefix for Record Types.

**--param1** *PARAM1* *Optional*

Parameter to pass to the Apex. Use as `%%%PARAM_1%%%` in the Apex code. Defaults to an empty value.

**--param2** *PARAM2* *Optional*

Parameter to pass to the Apex. Use as `%%%PARAM_2%%%` in the Apex code. Defaults to an empty value.

### 15.2.115 `update_admin_profile`

**Description:** Retrieves, edits, and redeploys the Admin.profile with full FLS perms for all objects/fields

**Class:** `cumulusci.tasks.salesforce.ProfileGrantAllAccess`



## Command Syntax

```
$ cci task run update_admin_profile
```

## Options

**--package\_xml** **PACKAGEXML** *Optional*

Override the default package.xml file for retrieving the Admin.profile and all objects and classes that need to be included by providing a path to your custom package.xml

**--record\_types** **RECORDTYPES** *Optional*

A list of dictionaries containing the required key *record\_type* with a value specifying the record type in format `<object>.<developer_name>`. Record type names can use the token strings `{managed}` and `{namespaced_org}` for namespace prefix injection as needed. By default, all listed record types will be set to visible and not default. Use the additional keys *visible*, *default*, and *person\_account\_default* set to true/false to override. NOTE: Setting *record\_types* is only supported in *cumulusci.yml*, command line override is not supported.

**--managed** **MANAGED** *Optional*

If True, uses the namespace prefix where appropriate. Use if running against an org with the managed package installed. Defaults to False

**--namespaced\_org** **NAMESPACEDORG** *Optional*

If True, attempts to prefix all unmanaged metadata references with the namespace prefix for deployment to the packaging org or a namespaced scratch org. Defaults to False

**--namespace\_inject** **NAMESPACEINJECT** *Optional*

If set, the namespace tokens in files and filenames are replaced with the namespace's prefix. Defaults to `project__package__namespace`

**--profile\_name** **PROFILENAME** *Optional*

Name of the Profile to target for updates (deprecated; use *api\_names* to target multiple profiles).

**--include\_packaged\_objects** **INCLUDEPACKAGEDOBJECTS** *Optional*

Automatically include objects from all installed managed packages. Defaults to True in projects that require CumulusCI 3.9.0 and greater that don't use a custom package.xml, otherwise False.

**--api\_names** **APINAMES** *Optional*

List of API names of Profiles to affect

### 15.2.116 update\_dependencies

**Description:** Installs all dependencies in `project__dependencies` into the target org

**Class:** `cumulusci.tasks.salesforce.UpdateDependencies`

## Command Syntax

```
$ cci task run update_dependencies
```

## Options

**--dependencies DEPENDENCIES** *Optional*

List of dependencies to update. Defaults to `project__dependencies`. Each dependency is a dict with either `'github'` set to a github repository URL or `'namespace'` set to a Salesforce package namespace. GitHub dependencies may include `'tag'` to install a particular git ref. Package dependencies may include `'version'` to install a particular version.

**--ignore\_dependencies IGNOREDEPENDENCIES** *Optional*

List of dependencies to be ignored, including if they are present as transitive dependencies. Dependencies can be specified using the `'github'` or `'namespace'` keys (all other keys are not used). Note that this can cause installations to fail if required prerequisites are not available.

**--purge\_on\_delete PURGEONDELETE** *Optional*

Sets the `purgeOnDelete` option for the deployment. Defaults to `True`

**--include\_beta INCLUDEBETA** *Optional*

Install the most recent release, even if beta. Defaults to `False`. This option is only supported for scratch orgs, to avoid installing a package that can't be upgraded in persistent orgs.

**--allow\_newer ALLOWNEWER** *Optional*

Deprecated. This option has no effect.

**--prefer\_2gp\_from\_release\_branch PREFER2GPFROMRELEASEBRANCH** *Optional*

If `True` and this build is on a release branch (feature/NNN, where NNN is an integer), or a child branch of a release branch, resolve GitHub managed package dependencies to 2GP builds present on a matching release branch on the dependency.

**--resolution\_strategy RESOLUTIONSTRATEGY** *Optional*

The name of a sequence of `resolution_strategy` (from `project__dependency_resolutions`) to apply to dynamic dependencies.

**--packages\_only PACKAGESONLY** *Optional*

Install only packaged dependencies. Ignore all unmanaged metadata. Defaults to `False`.

**--security\_type SECURITYTYPE** *Optional*

Which Profiles to install packages for (`FULL` = all profiles, `NONE` = admins only, `PUSH` = no profiles, `CUSTOM` = custom profiles). Defaults to `FULL`.

**--name\_conflict\_resolution NAMECONFLICTRESOLUTION** *Optional*

Specify how to resolve name conflicts when installing an Unlocked Package. Available values are `Block` and `RenameMetadata`. Defaults to `Block`.

**--activate\_remote\_site\_settings ACTIVATEREMOTESITESETTINGS** *Optional*

Activate Remote Site Settings when installing a package. Defaults to `True`.

### 15.2.117 update\_metadata\_first\_child\_text

**Description:** Updates the text of the first child of Metadata with matching tag. Adds a child for tag if it does not exist.

**Class:** `cumulusci.tasks.metadata_etl.UpdateMetadataFirstChildTextTask`

Metadata ETL task to update a single child element's text within metadata XML.

If the child doesn't exist, the child is created and appended to the Metadata. Furthermore, the value option is namespaced injected if the task is properly configured.

#### Example: Assign a Custom Object's Compact Layout

Researching `CustomObject` in the Metadata API documentation or even retrieving the `CustomObject`'s Metadata for inspection, we see the `compactLayoutAssignment` Field. We want to assign a specific Compact Layout for our Custom Object, so we write the following CumulusCI task in our project's `cumulusci.yml`.

```
tasks:
  assign_compact_layout:
    class_path: cumulusci.tasks.metadata_etl.UpdateMetadataFirstChildTextTask
    options:
      managed: False
      namespace_inject: $project_config.project__package__namespace
      entity: CustomObject
      api_names: OurCustomObject__c
      tag: compactLayoutAssignment
      value: "%%NAMESPACE%%DifferentCompactLayout"
      # We include a namespace token so it's easy to use this task in a managed_
      ↪ context.
```

Suppose the original `CustomObject` metadata XML looks like:

```
<?xml version="1.0" encoding="UTF-8"?>
<CustomObject xmlns="http://soap.sforce.com/2006/04/metadata">
  ...
  <label>Our Custom Object</label>
  <compactLayoutAssignment>OriginalCompactLayout</compactLayoutAssignment>
  ...
</CustomObject>
```

After running `cci task run assign_compact_layout`, the `CustomObject` metadata XML is deployed as:

```
<?xml version="1.0" encoding="UTF-8"?>
<CustomObject xmlns="http://soap.sforce.com/2006/04/metadata">
  ...
  <label>Our Custom Object</label>
  <compactLayoutAssignment>DifferentCompactLayout</compactLayoutAssignment>
  ...
</CustomObject>
```

## Command Syntax

```
$ cci task run update_metadata_first_child_text
```

## Options

**--metadata\_type METADATATYPE** *Required*

Metadata Type

**--tag TAG** *Required*

Targeted tag. The text of the first instance of this tag within the metadata entity will be updated.

**--value VALUE** *Required*

Desired value to set for the targeted tag's text. This value is namespace-injected.

**--api\_names APINAMES** *Optional*

List of API names of entities to affect

**--managed MANAGED** *Optional*

If False, changes namespace\_inject to replace tokens with a blank string

**--namespace\_inject NAMESPACEINJECT** *Optional*

If set, the namespace tokens in files and filenames are replaced with the namespace's prefix

Default: \$project\_config.project\_\_package\_\_namespace

**--api\_version APIVERSION** *Optional*

Metadata API version to use, if not project\_\_package\_\_api\_version.

## 15.2.118 update\_package\_xml

**Description:** Updates src/package.xml with metadata in src/

**Class:** cumulusci.tasks.metadata.package.UpdatePackageXml

## Command Syntax

```
$ cci task run update_package_xml
```

## Options

**--path PATH** *Required*

The path to a folder of metadata to build the package.xml from

Default: src

**--output OUTPUT** *Optional*

The output file, defaults to <path>/package.xml

**--package\_name PACKAGENAME** *Optional*

If set, overrides the package name inserted into the <fullName> element

**--managed MANAGED** *Optional*

If True, generate a package.xml for deployment to the managed package packaging org

**--delete DELETE** *Optional*

If True, generate a package.xml for use as a destructiveChanges.xml file for deleting metadata

### 15.2.119 upload\_beta

**Description:** Uploads a beta release of the metadata currently in the packaging org

**Class:** cumulusci.tasks.salesforce.PackageUpload

#### Command Syntax

```
$ cci task run upload_beta
```

#### Options

**--name NAME** *Required*

The name of the package version.

**--production PRODUCTION** *Optional*

If True, uploads a production release. Defaults to uploading a beta

**--description DESCRIPTION** *Optional*

A description of the package and what this version contains.

**--password PASSWORD** *Optional*

An optional password for sharing the package privately with anyone who has the password. Don't enter a password if you want to make the package available to anyone on AppExchange and share your package publicly.

**--post\_install\_url POSTINSTALLURL** *Optional*

The fully-qualified URL of the post-installation instructions. Instructions are shown as a link after installation and are available from the package detail view.

**--release\_notes\_url RELEASENOTESURL** *Optional*

The fully-qualified URL of the package release notes. Release notes are shown as a link during the installation process and are available from the package detail view after installation.

**--namespace NAMESPACE** *Optional*

The namespace of the package. Defaults to project\_\_package\_\_namespace

**--resolution\_strategy RESOLUTIONSTRATEGY** *Optional*

The name of a sequence of resolution\_strategy (from project\_\_dependency\_resolutions) to apply to dynamic dependencies. Defaults to 'production'.

### 15.2.120 upload\_production

**Description:** Uploads a production release of the metadata currently in the packaging org

**Class:** cumulusci.tasks.salesforce.PackageUpload

#### Command Syntax

```
$ cci task run upload_production
```

#### Options

**--name NAME** *Required*

The name of the package version.

Default: Release

**--production PRODUCTION** *Optional*

If True, uploads a production release. Defaults to uploading a beta

Default: True

**--description DESCRIPTION** *Optional*

A description of the package and what this version contains.

**--password PASSWORD** *Optional*

An optional password for sharing the package privately with anyone who has the password. Don't enter a password if you want to make the package available to anyone on AppExchange and share your package publicly.

**--post\_install\_url POSTINSTALLURL** *Optional*

The fully-qualified URL of the post-installation instructions. Instructions are shown as a link after installation and are available from the package detail view.

**--release\_notes\_url RELEASENOTESURL** *Optional*

The fully-qualified URL of the package release notes. Release notes are shown as a link during the installation process and are available from the package detail view after installation.

**--namespace NAMESPACE** *Optional*

The namespace of the package. Defaults to project\_\_package\_\_namespace

**--resolution\_strategy RESOLUTIONSTRATEGY** *Optional*

The name of a sequence of resolution\_strategy (from project\_\_dependency\_resolutions) to apply to dynamic dependencies. Defaults to 'production'.

### 15.2.121 upload\_user\_profile\_photo

**Description:** Uploads a profile photo for a specified or default User.

**Class:** cumulusci.tasks.salesforce.users.photos.UploadProfilePhoto

Uploads a profile photo for a specified or default User.

#### Examples

Upload a profile photo for the default user.

```
tasks:
  upload_profile_photo_default:
    group: Internal storytelling data
    class_path: cumulusci.tasks.salesforce.users.UploadProfilePhoto
    description: Uploads a profile photo for the default user.
    options:
      photo: storytelling/photos/default.png
```

Upload a profile photo for a user whose Alias equals grace or walker, is active, and created today.

```
tasks:
  upload_profile_photo_grace:
    group: Internal storytelling data
    class_path: cumulusci.tasks.salesforce.users.UploadProfilePhoto
    description: Uploads a profile photo for Grace.
    options:
      photo: storytelling/photos/grace.png
      where: (Alias = 'grace' OR Alias = 'walker') AND IsActive = true AND_
↪ CreatedDate = TODAY
```

#### Command Syntax

```
$ cci task run upload_user_profile_photo
```

#### Options

**--photo PHOTO** *Required*

Path to user's profile photo.

**--where WHERE** *Optional*

WHERE clause used querying for which User to upload the profile photo for.

- No need to prefix with WHERE
- The SOQL query must return one and only one User record.
- If no “where” is supplied, uploads the photo for the org's default User.

### 15.2.122 util\_sleep

**Description:** Sleeps for N seconds

**Class:** cumulusci.tasks.util.Sleep

#### Command Syntax

```
$ cci task run util_sleep
```

#### Options

**--seconds SECONDS** *Required*

The number of seconds to sleep

Default: 5

### 15.2.123 log

**Description:** Log a line at the info level.

**Class:** cumulusci.tasks.util.LogLine

#### Command Syntax

```
$ cci task run log
```

#### Options

**--level LEVEL** *Required*

The logger level to use

Default: info

**--line LINE** *Required*

A formatstring like line to log

**--format\_vars FORMATVARS** *Optional*

A Dict of format vars

### 15.2.124 generate\_dataset\_mapping

**Description:** Create a mapping for extracting data from an org.

**Class:** cumulusci.tasks.bulkdata.GenerateMapping

Generate a mapping file for use with the *extract\_dataset* and *load\_dataset* tasks. This task will examine the schema in the specified org and attempt to infer a mapping suitable for extracting data in packaged and custom objects as well as customized standard objects.



Mappings must be serializable, and hence must resolve reference cycles - situations where Object A refers to B, and B also refers to A. Mapping generation will stop and request user input to resolve such cycles by identifying the correct load order. If you would rather the mapping generator break such a cycle randomly, set the *break\_cycles* option to *auto*.

Alternately, specify the *ignore* option with the name of one of the lookup fields to suppress it and break the cycle. *ignore* can be specified as a list in *cumulusci.yml* or as a comma-separated string at the command line.

In most cases, the mapping generated will need minor tweaking by the user. Note that the mapping omits features that are not currently well supported by the *extract\_dataset* and *load\_dataset* tasks, such as references to the *User* object.

## Command Syntax

```
$ cci task run generate_dataset_mapping
```

## Options

**--path PATH** *Required*

Location to write the mapping file

Default: datasets/mapping.yml

**--namespace\_prefix NAMESPACEPREFIX** *Optional*

The namespace prefix to use

Default: \$project\_config.project\_\_package\_\_namespace

**--ignore IGNORE** *Optional*

Object API names, or fields in Object.Field format, to ignore

**--break\_cycles BREAKCYCLES** *Optional*

If the generator is unsure of the order to load, what to do? Set to *ask* (the default) to allow the user to choose or *auto* to pick randomly.

**--include INCLUDE** *Optional*

Object names to include even if they might not otherwise be included.

**--strip\_namespace STRIPNAMESPACE** *Optional*

If True, CumulusCI removes the project's namespace where found in fields and objects to support automatic namespace injection. On by default.

### 15.2.125 extract\_dataset

**Description:** Extract a sample dataset using the bulk API.

**Class:** cumulusci.tasks.bulkdata.ExtractData

## Command Syntax

```
$ cci task run extract_dataset
```

## Options

**--mapping MAPPING** *Required*

The path to a yaml file containing mappings of the database fields to Salesforce object fields

Default: datasets/mapping.yml

**--database\_url DATABASEURL** *Optional*

A DATABASE\_URL where the query output should be written

**--sql\_path SQLPATH** *Optional*

If set, an SQL script will be generated at the path provided This is useful for keeping data in the repository and allowing diffs.

Default: datasets/sample.sql

**--inject\_namespaces INJECTNAMESPACES** *Optional*

If True, the package namespace prefix will be automatically added to (or removed from) objects and fields based on the name used in the org. Defaults to True.

**--drop\_missing\_schema DROPMISSINGSCHEMA** *Optional*

Set to True to skip any missing objects or fields instead of stopping with an error.

## 15.2.126 load\_dataset

**Description:** Load a sample dataset using the bulk API.

**Class:** cumulusci.tasks.bulkdata.LoadData

## Command Syntax

```
$ cci task run load_dataset
```

## Options

**--database\_url DATABASEURL** *Optional*

The database url to a database containing the test data to load

**--mapping MAPPING** *Optional*

The path to a yaml file containing mappings of the database fields to Salesforce object fields

Default: datasets/mapping.yml

**--start\_step STARTSTEP** *Optional*

If specified, skip steps before this one in the mapping

**--sql\_path SQLPATH** *Optional*

If specified, a database will be created from an SQL script at the provided path

Default: datasets/sample.sql

**--ignore\_row\_errors IGNOREROWERRORS** *Optional*

If True, allow the load to continue even if individual rows fail to load.

**--reset\_oids RESETIDS** *Optional*

If True (the default), and the \_sf\_ids tables exist, reset them before continuing.

**--bulk\_mode BULKMODE** *Optional*

Set to Serial to force serial mode on all jobs. Parallel is the default.

**--inject\_namespaces INJECTNAMESPACES** *Optional*

If True, the package namespace prefix will be automatically added to (or removed from) objects and fields based on the name used in the org. Defaults to True.

**--drop\_missing\_schema DROPMISSINGSHEMA** *Optional*

Set to True to skip any missing objects or fields instead of stopping with an error.

**--set\_recently\_viewed SETRECENTLYVIEWED** *Optional*

By default, the first 1000 records inserted via the Bulk API will be set as recently viewed. If fewer than 1000 records are inserted, existing objects of the same type being inserted will also be set as recently viewed.

### 15.2.127 load\_custom\_settings

**Description:** Load Custom Settings specified in a YAML file to the target org

**Class:** cumulusci.tasks.salesforce.LoadCustomSettings

#### Command Syntax

```
$ cci task run load_custom_settings
```

#### Options

**--settings\_path SETTINGSPATH** *Required*

The path to a YAML settings file

### 15.2.128 remove\_metadata\_xml\_elements

**Description:** Remove specified XML elements from one or more metadata files

**Class:** cumulusci.tasks.metadata.modify.RemoveElementsXPath

## Command Syntax

```
$ cci task run remove_metadata_xml_elements
```

## Options

### **--xpath XPATH** *Optional*

An XPath specification of elements to remove. Supports the `re: regexp` function namespace. As in `re:match(text(), '.*__c')` Use `ns:` to refer to the Salesforce namespace for metadata elements. for example: `./ns:Layout/ns:relatedLists` (one-level) or `//ns:relatedLists` (recursive) Many advanced examples are available here: <https://github.com/SalesforceFoundation/NPSP/blob/26b585409720e2004f5b7785a56e57498796619f/cumulusci.yml#L342>

### **--path PATH** *Optional*

A path to the files to change. Supports wildcards including `**` for directory recursion. More info on the details: <https://www.poftut.com/python-glob-function-to-match-path-directory-file-names-with-examples/> <https://www.tutorialspoint.com/How-to-use-Glob-function-to-find-files-recursively-in-Python>

### **--elements ELEMENTS** *Optional*

A list of dictionaries containing path and xpath keys. Multiple dictionaries can be passed in the list to run multiple removal queries in the same task. This parameter is intended for usages invoked as part of a `cumulusci.yml` .

### **--chdir CHDIR** *Optional*

Change the current directory before running the replace

## 15.2.129 disable\_tdtm\_trigger\_handlers

**Description:** Disable specified TDTM trigger handlers

**Class:** `cumulusci.tasks.salesforce.trigger_handlers.SetTDTMHandlerStatus`

## Command Syntax

```
$ cci task run disable_tdtm_trigger_handlers
```

## Options

### **--handlers HANDLERS** *Optional*

List of Trigger Handlers (by Class, Object, or 'Class:Object') to affect (defaults to all handlers).

### **--namespace NAMESPACE** *Optional*

The namespace of the Trigger Handler object ('eda' or 'npsp'). The task will apply the namespace if needed.

### **--active ACTIVE** *Optional*

True or False to activate or deactivate trigger handlers.

### **--restore\_file RESTOREFILE** *Optional*

Path to the state file to store or restore the current trigger handler state. Set to False to discard trigger state information. By default the state is cached in an org-specific directory for later restore.

**--restore RESTORE** *Optional*

If True, restore the state of Trigger Handlers to that stored in the (specified or default) restore file.

### 15.2.130 restore\_tdtm\_trigger\_handlers

**Description:** Restore status of TDTM trigger handlers

**Class:** cumulusci.tasks.salesforce.trigger\_handlers.SetTDTMHandlerStatus

#### Command Syntax

```
$ cci task run restore_tdtm_trigger_handlers
```

#### Options

**--handlers HANDLERS** *Optional*

List of Trigger Handlers (by Class, Object, or 'Class:Object') to affect (defaults to all handlers).

**--namespace NAMESPACE** *Optional*

The namespace of the Trigger Handler object ('eda' or 'npsp'). The task will apply the namespace if needed.

**--active ACTIVE** *Optional*

True or False to activate or deactivate trigger handlers.

**--restore\_file RESTOREFILE** *Optional*

Path to the state file to store or restore the current trigger handler state. Set to False to discard trigger state information. By default the state is cached in an org-specific directory for later restore.

**--restore RESTORE** *Optional*

If True, restore the state of Trigger Handlers to that stored in the (specified or default) restore file.

Default: True

## 15.3 Flow Reference

CumulusCI's suite of standard flows are grouped into various categories depending on their intended purpose.

### 15.3.1 Org Setup

These are the primary flows for doing full setup of an org. They typically include a flow from the Dependency Management group, a flow from either the Deployment or Install / Uninstall group, and a flow from the Post-Install Configuration group.

## dev\_org

**Description:** Set up an org as a development environment for unmanaged metadata

### Flow Steps

```
1) flow: dependencies
  1) task: update_dependencies
  2) task: deploy_pre
2) flow: deploy_unmanaged
  0) task: dx_convert_from
    when: project_config.project__source_format == "sfdx" and not org_config.scratch
  1) task: unschedule_apex
  2) task: update_package_xml
    when: project_config.project__source_format != "sfdx" or not org_config.scratch
  3) task: deploy
    when: project_config.project__source_format != "sfdx" or not org_config.scratch
  3.1) task: deploy
    when: project_config.project__source_format == "sfdx" and org_config.scratch
  4) task: uninstall_packaged_incremental
    when: project_config.project__source_format != "sfdx" or not org_config.scratch
  5) task: snapshot_changes
3) flow: config_dev
  1) task: deploy_post
  2) task: update_admin_profile
4) task: snapshot_changes
```

## dev\_org\_beta\_deps

**Description:** This flow is deprecated. Please use dev\_org instead.

### Flow Steps

```
1) flow: dependencies
  1) task: update_dependencies
  2) task: deploy_pre
2) flow: deploy_unmanaged
  0) task: dx_convert_from
    when: project_config.project__source_format == "sfdx" and not org_config.scratch
  1) task: unschedule_apex
  2) task: update_package_xml
    when: project_config.project__source_format != "sfdx" or not org_config.scratch
  3) task: deploy
    when: project_config.project__source_format != "sfdx" or not org_config.scratch
  3.1) task: deploy
    when: project_config.project__source_format == "sfdx" and org_config.scratch
  4) task: uninstall_packaged_incremental
    when: project_config.project__source_format != "sfdx" or not org_config.scratch
  5) task: snapshot_changes
3) flow: config_dev
  1) task: deploy_post
  2) task: update_admin_profile
```

## dev\_org\_namespaced

**Description:** Set up a namespaced scratch org as a development environment for unmanaged metadata

### Flow Steps

```

1) flow: dependencies
    1) task: update_dependencies
    2) task: deploy_pre
2) flow: deploy_unmanaged
    0) task: dx_convert_from
       when: project_config.project__source_format == "sfdx" and not org_config.scratch
    1) task: unschedule_apex
    2) task: update_package_xml
       when: project_config.project__source_format != "sfdx" or not org_config.scratch
    3) task: deploy
       when: project_config.project__source_format != "sfdx" or not org_config.scratch
    3.1) task: deploy
         when: project_config.project__source_format == "sfdx" and org_config.scratch
    4) task: uninstall_packaged_incremental
       when: project_config.project__source_format != "sfdx" or not org_config.scratch
    5) task: snapshot_changes
3) flow: config_dev
    1) task: deploy_post
    2) task: update_admin_profile
4) task: snapshot_changes

```

## install\_beta

**Description:** Install and configure the latest beta version

### Flow Steps

```

1) flow: dependencies
    1) task: update_dependencies
    2) task: deploy_pre
2) task: install_managed_beta
3) flow: config_managed
    1) task: deploy_post
    2) task: update_admin_profile
4) task: snapshot_changes

```

## install\_prod

**Description:** Install and configure the latest production version

### Flow Steps

```

1) flow: dependencies
    1) task: update_dependencies
    2) task: deploy_pre
2) task: install_managed
3) flow: config_managed

```

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```
1) task: deploy_post
2) task: update_admin_profile
4) task: snapshot_changes
```

## qa\_org

**Description:** Set up an org as a QA environment for unmanaged metadata

### Flow Steps

```
1) flow: dependencies
    1) task: update_dependencies
    2) task: deploy_pre
2) task: None
3) flow: config_qa
    1) task: deploy_post
    2) task: update_admin_profile
4) task: snapshot_changes
```

## qa\_org\_2gp

**Description:** Set up an org as a QA environment using a second-generation package

### Flow Steps

```
1) flow: install_2gp_commit
    1) task: github_package_data
    2) flow: dependencies
        1) task: update_dependencies
        2) task: deploy_pre
    3) task: install_managed
2) flow: config_qa
    1) task: deploy_post
    2) task: update_admin_profile
3) task: snapshot_changes
```

## regression\_org

**Description:** Simulates an org that has been upgraded from the latest release of to the current beta and its dependencies, but deploys any unmanaged metadata from the current beta.

### Flow Steps

```
1) flow: install_regression
    1) flow: dependencies
        1) task: update_dependencies
        2) task: deploy_pre
    2) task: install_managed
    3) task: install_managed_beta
2) flow: config_regression
```

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```

1) flow: config_managed
    1) task: deploy_post
    2) task: update_admin_profile
3) task: snapshot_changes

```

### 15.3.2 Dependency Management

These flows deploy dependencies (base packages and unmanaged metadata) to a target org environment.

#### beta\_dependencies

**Description:** This flow is deprecated. Please use the *dependencies* flow and set the *include\_beta* option on the first task, *update\_dependencies*. Deploy the latest (beta) version of dependencies to prepare the org environment for the package metadata

##### Flow Steps

```

1) task: update_dependencies
2) task: deploy_pre

```

#### dependencies

**Description:** Deploy dependencies to prepare the org environment for the package metadata

##### Flow Steps

```

1) task: update_dependencies
2) task: deploy_pre

```

### 15.3.3 Deployment

These flows deploy the main package metadata to a target org environment.

#### deploy\_packaging

**Description:** Process and deploy the package metadata to the packaging org

##### Flow Steps

```

0) task: dx_convert_from
   when: project_config.project__source_format == "sfdx"
1) task: unschedule_apex
2) task: create_managed_src
3) task: update_package_xml
4) task: deploy
5) task: revert_managed_src
6) task: uninstall_packaged_incremental

```

## deploy\_unmanaged

**Description:** Deploy the unmanaged metadata from the package

### Flow Steps

```
0) task: dx_convert_from
   when: project_config.project__source_format == "sfdx" and not org_config.scratch
1) task: unschedule_apex
2) task: update_package_xml
   when: project_config.project__source_format != "sfdx" or not org_config.scratch
3) task: deploy
   when: project_config.project__source_format != "sfdx" or not org_config.scratch
3.1) task: deploy
     when: project_config.project__source_format == "sfdx" and org_config.scratch
4) task: uninstall_packaged_incremental
   when: project_config.project__source_format != "sfdx" or not org_config.scratch
5) task: snapshot_changes
```

## deploy\_unmanaged\_ee

**Description:** Deploy the unmanaged metadata from the package to an Enterprise Edition org

### Flow Steps

```
0) task: dx_convert_from
   when: project_config.project__source_format == "sfdx"
1) task: unschedule_apex
2) task: update_package_xml
3) task: create_unmanaged_ee_src
4) task: deploy
5) task: revert_unmanaged_ee_src
6) task: uninstall_packaged_incremental
```

## unmanaged\_ee

**Description:** Deploy the unmanaged package metadata and all dependencies to the target EE org

### Flow Steps

```
1) flow: dependencies
   1) task: update_dependencies
   2) task: deploy_pre
2) flow: deploy_unmanaged_ee
   0) task: dx_convert_from
     when: project_config.project__source_format == "sfdx"
   1) task: unschedule_apex
   2) task: update_package_xml
   3) task: create_unmanaged_ee_src
   4) task: deploy
   5) task: revert_unmanaged_ee_src
   6) task: uninstall_packaged_incremental
```

### 15.3.4 Install / Uninstall

These flows handle package installation and uninstallation in particular scenarios.

#### install\_2gp\_commit

**Description:** Install the 2GP package for the current commit

**Flow Steps**

```
1) task: github_package_data
2) flow: dependencies
    1) task: update_dependencies
    2) task: deploy_pre
3) task: install_managed
```

#### install\_prod\_no\_config

**Description:** Install but do not configure the latest production version

**Flow Steps**

```
1) flow: dependencies
    1) task: update_dependencies
    2) task: deploy_pre
2) task: install_managed
3) task: deploy_post
```

#### install\_regression

**Description:** Install the latest beta dependencies and upgrade to the latest beta version from the most recent production version

**Flow Steps**

```
1) flow: dependencies
    1) task: update_dependencies
    2) task: deploy_pre
2) task: install_managed
3) task: install_managed_beta
```

#### uninstall\_managed

**Description:** Uninstall the installed managed version of the package. Run this before install\_beta or install\_prod if a version is already installed in the target org.

**Flow Steps**

```
1) task: uninstall_post
2) task: uninstall_managed
```

## 15.3.5 Post-Install Configuration

These flows perform configuration after the main package has been installed or deployed.

### config\_apextest

**Description:** Configure an org to run apex tests after package metadata is deployed

#### Flow Steps

- 1) task: deploy\_post
- 2) task: update\_admin\_profile

### config\_dev

**Description:** Configure an org for use as a dev org after package metadata is deployed

#### Flow Steps

- 1) task: deploy\_post
- 2) task: update\_admin\_profile

### config\_managed

**Description:** Configure an org for use after the managed package has been installed.

#### Flow Steps

- 1) task: deploy\_post
- 2) task: update\_admin\_profile

### config\_packaging

**Description:** Configure packaging org for upload after package metadata is deployed

#### Flow Steps

- 1) task: update\_admin\_profile

### config\_qa

**Description:** Configure an org for use as a QA org after package metadata is deployed

#### Flow Steps

- 1) task: deploy\_post
- 2) task: update\_admin\_profile

## config\_regression

**Description:** Configure an org for QA regression after the package is installed

### Flow Steps

```

1) flow: config_managed
    1) task: deploy_post
    2) task: update_admin_profile

```

## 15.3.6 Continuous Integration

These flows are designed to be run automatically by a continuous integration (CI) system in response to new commits. They typically set up an org and run Apex tests.

### ci\_beta

**Description:** Install the latest beta version and runs apex tests from the managed package

### Flow Steps

```

1) flow: install_beta
    1) flow: dependencies
        1) task: update_dependencies
        2) task: deploy_pre
    2) task: install_managed_beta
    3) flow: config_managed
        1) task: deploy_post
        2) task: update_admin_profile
    4) task: snapshot_changes
2) task: run_tests

```

### ci\_feature

**Description:** Prepare an unmanaged metadata test org and run Apex tests. Intended for use against feature branch commits.

### Flow Steps

```

0.5) task: github_parent_pr_notes
1) flow: dependencies
    1) task: update_dependencies
    2) task: deploy_pre
2) flow: deploy_unmanaged
    0) task: dx_convert_from
        when: project_config.project__source_format == "sfdx" and not org_config.scratch
    1) task: unschedule_apex
    2) task: update_package_xml
        when: project_config.project__source_format != "sfdx" or not org_config.scratch
    3) task: deploy
        when: project_config.project__source_format != "sfdx" or not org_config.scratch
    3.1) task: deploy

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```

        when: project_config.project__source_format == "sfdx" and org_config.scratch
4) task: uninstall_packaged_incremental
    when: project_config.project__source_format != "sfdx" or not org_config.scratch
5) task: snapshot_changes
3) flow: config_apextest
    1) task: deploy_post
    2) task: update_admin_profile
4) task: run_tests
5) task: github_automerge_feature
    when: project_config.repo_branch and project_config.repo_branch.startswith(project_
↪config.project__git__prefix_feature)

```

### ci\_feature\_2gp

**Description:** Install as a managed 2gp package and run Apex tests. Intended for use after build\_feature\_test\_package.

#### Flow Steps

```

1) flow: install_2gp_commit
    1) task: github_package_data
    2) flow: dependencies
        1) task: update_dependencies
        2) task: deploy_pre
    3) task: install_managed
2) flow: config_apextest
    1) task: deploy_post
    2) task: update_admin_profile
3) task: run_tests

```

### ci\_feature\_beta\_deps

**Description:** This flow is deprecated. Please use ci\_feature instead.

#### Flow Steps

```

0.5) task: github_parent_pr_notes
1) flow: dependencies
    1) task: update_dependencies
    2) task: deploy_pre
2) flow: deploy_unmanaged
    0) task: dx_convert_from
        when: project_config.project__source_format == "sfdx" and not org_config.scratch
    1) task: unschedule_apex
    2) task: update_package_xml
        when: project_config.project__source_format != "sfdx" or not org_config.scratch
    3) task: deploy
        when: project_config.project__source_format != "sfdx" or not org_config.scratch
    3.1) task: deploy
        when: project_config.project__source_format == "sfdx" and org_config.scratch
    4) task: uninstall_packaged_incremental
        when: project_config.project__source_format != "sfdx" or not org_config.scratch

```

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```

    5) task: snapshot_changes
3) flow: config_apextest
    1) task: deploy_post
    2) task: update_admin_profile
4) task: run_tests
5) task: github_automerge_feature
   when: project_config.repo_branch and project_config.repo_branch.startswith(project_
   ↪config.project__git__prefix_feature)

```

## ci\_master

**Description:** Deploy the package metadata to the packaging org and prepare for managed package version upload. Intended for use against main branch commits.

### Flow Steps

```

1) flow: dependencies
    1) task: update_dependencies
    2) task: deploy_pre
2) flow: deploy_packaging
    0) task: dx_convert_from
      when: project_config.project__source_format == "sfdx"
    1) task: unschedule_apex
    2) task: create_managed_src
    3) task: update_package_xml
    4) task: deploy
    5) task: revert_managed_src
    6) task: uninstall_packaged_incremental
3) flow: config_packaging
    1) task: update_admin_profile

```

## ci\_release

**Description:** Install a production release version and runs tests from the managed package

### Flow Steps

```

1) flow: install_prod
    1) flow: dependencies
      1) task: update_dependencies
      2) task: deploy_pre
    2) task: install_managed
    3) flow: config_managed
      1) task: deploy_post
      2) task: update_admin_profile
    4) task: snapshot_changes
2) task: run_tests

```

## 15.3.7 Release Operations

These flows are used to release new package versions.

### build\_feature\_test\_package

**Description:** Create a 2gp managed package version

#### Flow Steps

```
1) task: update_package_xml
   when: project_config.project__source_format != "sfdx"
2) task: create_package_version
```

### release\_2gp\_beta

**Description:** Upload and release a beta 2gp managed package version

#### Flow Steps

```
1) task: create_package_version
2) task: github_release
3) task: github_release_notes
4) task: github_automerge_main
```

### release\_2gp\_production

**Description:** Promote the latest beta 2gp managed package version and create a new release in GitHub

#### Flow Steps

```
1) task: promote_package_version
2) task: github_release
3) task: github_release_notes
```

### release\_beta

**Description:** Upload and release a beta version of the metadata currently in packaging

#### Flow Steps

```
1) task: upload_beta
2) task: github_release
3) task: github_release_notes
4) task: github_automerge_main
```



### release\_production

**Description:** Upload and release a production version of the metadata currently in packaging

**Flow Steps**

```
1) task: upload_production
2) task: github_release
3) task: github_release_notes
```

### release\_unlocked\_beta

**Description:** Upload and release a beta 2gp unlocked package version

**Flow Steps**

```
1) task: create_package_version
2) task: github_release
3) task: github_release_notes
4) task: github_automerge_main
```

### release\_unlocked\_production

**Description:** Promote the latest beta 2GP unlocked package version and create a new release in GitHub

**Flow Steps**

```
1) task: promote_package_version
2) task: github_release
3) task: github_release_notes
```

## 15.3.8 Other

This is a catch-all group for any flows without a designated “group” attribute in `cumulusci.yml`.

### robot\_docs

**Description:** Generates documentation for robot framework libraries

**Flow Steps**

```
1) task: robot_libdoc
2) task: robot_testdoc
```

### test\_performance\_LDV

**Description:** Test performance in an LDV org

#### Flow Steps

1) task: robot
----------------

### test\_performance\_scratch

**Description:** Test performance of a scratch org

#### Flow Steps

1) task: robot
----------------

## 15.4 Environment Variables

CumulusCI has environment variables that are useful when CumulusCI is being run inside of web applications, such as MetaCI, MetaDeploy, and Metecho. The following is a reference list of available environment variables that can be set.

### 15.4.1 CUMULUSCI\_AUTO\_DETECT

Set this environment variable to autodetect branch and commit information from `HEROKU_TEST_RUN_BRANCH` and `HEROKU_TEST_RUN_COMMIT_VERSION` environment variables.

### 15.4.2 CUMULUSCI\_DISABLE\_REFRESH

If present, will instruct CumulusCI to not refresh OAuth tokens for orgs.

### 15.4.3 CUMULUSCI\_KEY

An alphanumeric string used to encrypt org credentials at rest when an OS keychain is not available.

### 15.4.4 CUMULUSCI\_REPO\_URL

Used for specifying a GitHub Repository for CumulusCI to use when running in a CI environment.

### 15.4.5 GITHUB\_APP\_ID

Your GitHub App's identifier.

### 15.4.6 GITHUB\_APP\_KEY

Contents of a JSON Web Token (JWT) used to [authenticate a GitHub app](#).

### 15.4.7 GITHUB\_TOKEN

A GitHub [personal access token](#).

### 15.4.8 HEROKU\_TEST\_RUN\_BRANCH

Used for specifying a specific branch to test against in a Heroku CI environment

### 15.4.9 HEROKU\_TEST\_RUN\_COMMIT\_VERSION

Used to specify a specific commit to test against in a Heroku CI environment.

### 15.4.10 SFDX\_CLIENT\_ID

Client ID for a Connected App used to authenticate to a persistent org, e.g. a Developer Hub. Set with SFDX\_HUB\_KEY.

### 15.4.11 SFDX\_HUB\_KEY

Contents of JSON Web Token (JWT) used to authenticate to a persistent org, e.g. a Dev Hub. Set with SFDX\_CLIENT\_ID.

### 15.4.12 SFDX\_ORG\_CREATE\_ARGS

Extra arguments passed to `sfdx force:org:create`. Can be used to pass key-value pairs.



## ABOUT CUMULUSCI

### 16.1 History

#### 16.1.1 3.43.0 (2021-09-02)

##### Critical Changes

- We now support all package installation options for the `update_dependencies` and `install_managed` tasks, including `activate_remote_site_settings`, `security_type`, `name_conflict_resolution`, and `password` (`password` not available for `update_dependencies`). (#2811)

We also fixed a minor inconsistency in defaulting the `activate_remote_site_settings` (or formerly `activateRSS`) option. Projects that define custom tasks based on the `InstallPackageVersion` class should ensure they explicitly set the `activate_remote_site_settings` option, or accept the new default of `True`.

MetaDeploy install plans now *do not* freeze defaulted package install options. If your install plans are dependent on specific install options, we recommend explicitly specifying them. Install plans without explicit options will use the defaults at the time of execution.

##### Changes

- The `sources` feature, which allows CumulusCI projects to consume automation from other projects, now supports specifying a `resolution_strategy`, just like dependencies. Sources can now resolve to the same GitHub refs as corresponding dependencies, including branch matching. The default behavior is to use the `production` resolution strategy. (#2807)
- Added several new tasks for configuring Marketing Cloud: `marketing_cloud_create_subscriber_attribute`, `marketing_cloud_create_user`, and `marketing_cloud_update_user_role`. (#2838)
- In the mapping file for the `load_dataset` task, the `batch_size` can now be specified for Bulk API steps in addition to REST API steps. (#2813)
- The `snowfakery` task now supports the `ignore_row_errors` option to continue loading even if there are row errors. (#2819)
- We made significant updates to the [documentation for Robot Framework](#). (#2834, #2847)
- We improved option validation for the `add_page_layout_fields` task. (#2828)

##### Issues Fixed

- Fixed handling of timezones when the `start_time` option is specified for the push tasks. (#2814)
- Fixed the `deploy_marketing_cloud_package` task to handle changes to the Marketing Cloud API. (#2816)
- Fixed an issue where MetaDeploy install steps that used 04t package version Ids, including 2GP installations, were frozen with incorrect titles. (#2817)

- Fixed an issue causing 2GP commit-status builds to fail when the local Git repository has a detached HEAD (#2818)
- Fixed a bug in the `dry_run` option for the `metadeploy_publish` task where explicitly setting the option to `False` did not disable the dry run. (#2836)
- Improved the error message shown by the `load_dataset` task if a table is missing from the dataset. (#2813)
- Improved the warning message shown when CumulusCI can't encrypt org and service config files. (#2839)

#### Internal Changes

- CumulusCI has improved infrastructure for its own integration tests. (#2783)
- Filing a CumulusCI issue on GitHub now presents a form to enter details. (#2829)
- Added a linter to ensure consistent formatting of YAML files within the CumulusCI codebase. (#2844)

### 16.1.2 3.42.0 (2021-08-19)

#### Critical Changes

- The `github_release` task now requires the `tag_prefix` option to be passed, because for 2nd-generation packages we can't tell from the version number whether it is a beta or not. We've updated the standard release flows to set the `tag_prefix` appropriately, but if you have custom flows using this task you will need to update them. (#2792)
- In order to run the `github_copy_subtree` task for a specific package version, you must now use the `tag_name` option instead of the `version` option. Using the `version` option set to `latest` or `latest_beta` is deprecated; it's preferred to pass these values in the `tag_name` option instead. (#2792)

#### Changes

- The `uninstall_packaged_incremental` task now defaults to ignoring non-deletable `CustomObjectTranslation` metadata. If your project customizes the `ignore_types` option on `uninstall_packaged_incremental`, we recommend you add `CustomObjectTranslation` to this option. (#2790)

#### Issues Fixed

- Fixed an issue where bulk job results were being miscounted. (Thanks @sfdcale!) (#2789)
- Fixed an issue where GitHub tags for a 2GP package would always include the "release" prefix (even for Beta package versions). (#2792)

### 16.1.3 3.41.0 (2021-08-05)

#### Changes

- We added a new Metadata ETL task, `add_page_layout_fields`, that allows adding fields to existing layouts. (#2766)
- We added a task to enable an Einstein prediction: `enable_einstein_prediction` (thanks, @erikperkins!) (#2778)
- We added standard flows for releasing unlocked packages: `release_unlocked_beta` and `release_unlocked_production` (#2768)
- We added [documentation](#) for using CumulusCI to build managed 2GP packages, unlocked packages, and extending NPSP and EDA with 2GP packages. (#2768)
- Contributions to CCI now require verification by isort, which ensures consistency in the order that imports are used. (#2770)

- CumulusCI now supports deploying unmanaged dependencies in SFDX source format. (#2735)
- The `create_package_version` task now handles dependencies that use a `zip_url`. (#2735)
- Updates to Github Actions configuration documentation. Thanks @Julian88Tex (#2773)
- CumulusCI now automatically recognizes services and orgs configured via environment variables. See the [docs](#) for more details. (#2676 and #2776)
- We've updated the Push Upgrade tasks (`push_list`, `push_sandbox`, etc) task option `start_time` to accept ISO-8601 formatted datetimes. (#2769)
- You can now specify "sandbox": true on a CUMULUSCI\_ORG\_\* variable in headless environments to indicate that the org you want to connect to is a sandbox. when connecting sandbox orgs in a headless environment. (#2753)

#### Issues Closed

- Fixed an issue where scratch orgs failed to be deleted in CI environments. (#2676)
- Fixed an issue where deleting an org failed to mark the org as deleted on CumulusCI's keychain. (#2676)
- Fixed an issue where CumulusCI would fail on Linux distributions that were incompatible with the `keyring` package. (#2676)
- We fixed an issue causing the `release_2gp_production` flow to fail with a dependency parsing error. (#2767)
- Fixed a couple issues with connecting CumulusCI to sandboxes using enhanced domains. (#2753 and #2765)
- Fixed a bug where the `github_release` task was not marking the "This is a pre-release" checkbox for beta releases. (#2788)

### 16.1.4 3.40.1 (2021-07-22)

#### Issues Closed

- Fixed an issue where a missing dependency was causing the homebrew installer formula to break.

### 16.1.5 3.40.0 (2021-07-22)

#### Critical Changes

- The `create_package_version` task no longer creates Unlocked Packages from the `unpackaged/pre` and `unpackaged/post` directories of dependencies, or local `unpackaged/pre` directories by default. This behavior is now opt-in via the `create_unlocked_dependency_packages` option, which defaults to `False`. Projects using the old default behavior must explicitly set this option. We believe the new behavior is a more sane default for most 2GP projects. (#2741)

#### Changes

- The `add_standard_value_set_entries` task now supports value sets for `LeadStatus`. (#2695, with thanks to @naicigam)
- We updated the default API version to 52.0. (#2740)

#### Issues Closed

- Fixed an issue where the the built-in connected app was not accessible when running CumulusCI in a headless environment. (#2737)
- The `create_package_version` task now supports `objectSettings` in the org definition file. (#2741)

- We fixed issues in working with files containing Unicode characters on some Windows systems when using source-tracking commands. (#2739)
- Fixed a bug where the `anon_apex` task had option text that was missing spaces. (#2736)

### 16.1.6 3.39.1 (2021-07-08)

Changes:

- Fix a bug with the integration of CumulusCI and the new SOQLQuery Feature

### 16.1.7 3.39.0 (2021-07-08)

Changes:

- A new *snowfakery* task with better usability and multi-processor support. Look at the CumulusCI docs to learn the new syntax: <https://cumulusci.readthedocs.io/en/stable/data.html#generate-fake-data> (#2705)
- CumulusCI now uses Snowfakery 2.0, with various new features, especially the ability to query into orgs. More information: <https://github.com/SFDO-Tooling/Snowfakery/releases/tag/2.0> (#2705)
- We improved our Robot documentation so that it's possible to link to keyword documentation instead of having to download it locally (#2696)
- CumulusCI uses a new port (7788) for the built-in connected app to lessen the chances that the port is in use. (#2698)
- CumulusCI now checks if the port associated with a callback URL/redirect URI is in use during OAuth2 flows, and if so, raises a more friendly error. (#2698)
- The `generate_data_dictionary` task now includes Custom Settings, Custom Metadata Types, and Platform Events. (#2712)
- The `generate_data_dictionary` task now excludes any schema with visibility set to Protected. This behavior can be turned off (including protected schema) with the `include_protected_schema` option. (#2712)
- The `generate_data_dictionary` task now parses object and field metadata anywhere in a Salesforce DX release other than in the `unpackaged/` directory tree. (#2712)
- Builds that install feature-test 2GP packages now present a cleaner error message when the current commit is not found on GitHub. (#2713)
- SFDX and CumulusCI both support `noancestors` as a Scratch org config option but CumulusCI generated a warning if users tried to specify the option in `cumulusci.yml`. (#2721)

Issues closed:

- Fixed issue where CumulusCI did not correctly convert a package version specified as a number in YAML to a string. This now raises a warning. (#2692)
- Fixed a bug where OAuth errors were not reported in detail. (#2694)
- Fixed an issue where CumulusCI did not grant permissions to Custom Tabs when running `update_admin_profile` without a custom `package.xml`. Projects that use a custom `package.xml` with `update_admin_profile` should update their manifest to include a CustomTab wildcard for the same outcome. (#2699)
- Fixed an issue where the `dx`, `dx_push`, and `dx_pull` tasks did not refresh the org's access token. (#2703)
- Fixed issues in the `generate_data_dictionary` task that resulted in failures when processing fields with blank Help Text or processing standard fields. (#2706)



- Fixed an issue preventing `generate_data_dictionary` from working with four-digit (1.0.0.0) 2GP version numbers. (#2712)
- Fixed an issue causing `release_2gp_beta` to fail to create a GitHub release with a dependency-parsing error. (#2720)

### 16.1.8 3.38.0 (2021-06-24)

Changes:

- The built-in connected app that CumulusCI uses by default is now visible in the output of the `cci service list` command. This makes it possible to switch back and forth between this connected app and another one as the current default when multiple `connected_app` services are configured. The built-in `connected_app` service has the name `built-in` and cannot be renamed or removed. (#2664)
- The `generate_data_dictionary` task includes a new option, `include_prerelease`. If set to `True`, CumulusCI will include unreleased schema in the data dictionary from the current branch on GitHub, with the version listed as “Prerelease”. (#2671)
- Added a new task, `gather_release_notes`, which generates an HTML file with release notes from multiple repositories. (#2633)
- The `deploy_marketing_cloud_package` task includes a new option, `custom_inputs`, which can be used to specify values to fill in for inputs in a Marketing Cloud package. (#2683)
- Mappings for the `extract_dataset` task can now specify a `soql_filter` to restrict which records are extracted. Thanks @sfdcale (#2663)
- Robot Framework: The `Scroll Element Into View` keyword in the Salesforce library now scrolls the center of the element into view rather than the top. (#2689)

Issues closed:

- Fixed a bug where CumulusCI could not parse the repository owner and name from an ssh git remote URL if it used an ssh alias instead of `github.com`. (#2684)
- Fixed a bug where `cci service info <service_type>` would display `None` as the name for the default service if no name was provided. (#2664)
- Fixed a missing dependency on the `contextvars` Python package in Python 3.6.

### 16.1.9 3.37.0 (2021-06-10)

Changes

- The `install_managed` task now supports 2GP releases (#2655).
- We changed the behavior of the `release_2gp_beta` flow to always upload a package version, even if metadata has not changed (#2651).
- We now support sourcing install keys for packages from environment variables via the `password_env_name` dependency key (#2622).

Robot Framework

- We upgraded SeleniumLibrary to 5.x (#2660).
- We added a new keyword “select window” to Salesforce library, to replace the keyword of the same name which was renamed in SeleniumLibrary 5.x to ‘switch window’. We will be removing this keyword in a future release; tests should use ‘switch window’ instead.

#### Issues Closed

- We corrected some JavaScript issues that were occurring with Chrome 91. (#2652)
- We fixed a bug impacting the `generate_data_dictionary` task when used with dependencies (#2653).
- We fixed an issue causing `sfdx` commands that had options with spaces to fail to execute on Windows (#2656).
- We fixed an issue causing the creation of incorrect 2GP beta tags (#2651).

### 16.1.10 3.36.0 (2021-05-27)

#### Changes

- Added the option `tag_prefix` to the `github_release` task. This option can be set to specify what prefix you would like to use when CumulusCI creates a release tag for you in GitHub. (#2642)
- The `deploy_marketing_cloud_package` task has been updated to match changes to the Marketing Cloud Package Manager API. It also now raises an exception if the deployment failed. (#2632)

#### Robot Framework

- Improved the output of the `robot_libdoc` task. (#2627)

#### Data generation with Snowfakery:

- Updated to [Snowfakery 1.12](#) (#2538)

#### Issues Closed

- Fixed an issue where flow reference documentation was rendering with an error. (#2646)
- CumulusCI will now remove orgs when the `--delete-org` option is passed to `cci flow run`, even if an error occurs while running the flow. (#2644)
- Fixed a bug where beta tags created via the `release_2gp_beta` flow were not receiving the proper tag prefix. (#2642)
- Fixed namespace injection for filenames with a `___NAMESPACE___` token in `sfdx` format. (#2631) (Thanks @bethbrains)
- Fixed a bug in `cci org connect` where the `--sandbox` flag was directing users to login at `login.salesforce.com` instead of `test.salesforce.com`. (#2630)
- Fixed a regression where the `skip` key for a dependency could no longer be specified as a single string instead of a list. (#2629)
- Fixed a regression in freezing the `deploy_pre/deploy_post` tasks for MetaDeploy install plans. (#2626)
- Fixed bugs in the `deploy_marketing_cloud_package` task's payload construction. (#2620, #2621)

### 16.1.11 3.35.0 (2021-05-13)

#### Critical Changes

- Upgraded Robot Framework to 4.x. For information about new features and some backward incompatibilities see the [Robot Framework 4.0 release notes](#). (#2603)
- The `update_dependencies` task now guarantees to resolve unpackaged metadata directories (subdirectories of `unpackaged/pre` and `unpackaged/post`) in alphabetical order, matching the behavior of `deploy_pre` and `deploy_post`. `unpackaged/pre/bar` will deploy prior to `unpackaged/pre/foo`. The previous behavior

was undefined, which caused rare problems. This change is critical only for projects that have deployment-order dependencies between unpackaged directories located in upstream dependencies and rely on the current undefined load order. (#2588)

#### Changes

- The CumulusCI documentation has a new section: [Testing with Second-Generation Packaging](#) (#2597)
- CumulusCI has two new service types: `oauth2_client` & `marketing_cloud`. These are considered experimental. (#2602)
- The `marketing_cloud` service allows users to connect to a Marketing Cloud tenant via OAuth so that tasks that work with Marketing Cloud can make API calls on the user's behalf. (#2602)
- The `oauth2_client` service takes information for an individual OAuth2 client which can then be used in place of the default client. This currently applies only to the `marketing_cloud` service. To setup a Marketing Cloud service with a specific OAuth2 client use: `cci service connect marketing-cloud <name-of-service> --oauth_client <name-of-oauth-client>`. (#2602)
- CumulusCI has a new task: `deploy_marketing_cloud_package`. This task allows a user to pass the path to a .zip file to a Marketing Cloud package (downloaded from the Marketing Cloud Package Manager) and deploy the package via a `marketing_cloud` service (see above). Note that successfully deploying a package using this task may require permissions that are not generally available. (#2602)
- The `install_managed` and `install_managed_beta` tasks now take no action if the specified package is already installed in the target org. (#2590)
- The `cci org list` command can now output in JSON format by passing it the `--json` flag. (#2593)

#### Issues Closed

- Fixed an issue parsing `cumulusci.yml` files that contained Unicode characters on Windows. (#2617)
- Fixed an issue in the `github_copy_subtree` task where CumulusCI would silently generate incorrect or truncated commits when a directory was passed to the `include` task option. (#2601)
- The `deploy_pre` and `deploy_post` tasks avoid warnings by freezing installer steps that match current expectations. (#2589)

### 16.1.12 3.34.1 (2021-04-30)

#### Issues Closed

- Fixed a regression in the `load_dataset` task where some sObjects could not be loaded without explicitly turning off the new `set_recently_viewed` option.

### 16.1.13 3.34.0 (2021-04-29)

#### Critical Changes:

- If you have custom flows that utilize the `github_release` task, they will need to be updated to include the `package_type` option (which is required). (#2546)

#### Changes:

- The `github_release` task now has a `package_type` option which is included in the information written to GitHub releases
  - `release_beta` (IGP)
  - `release_production` (IGP)

- `release_2gp_beta` (2GP)
- `release_2gp_production` (2GP)

(#2546)

- The `update_dependencies` task now supports a `packages_only` option, which suppresses the installation of unpackaged metadata dependencies. This option is intended to support building update-only or idempotent installers. (#2587)
- The `github_automerge_main` task has a new option, `skip_future_releases`, which can be set to `False` to disable the default behavior of skipping branches that are numeric (and thus considered release branches) but not the lowest number. (#2582)
- Added a new option `set_recently_viewed` to the `load_dataset` task that sets newly inserted data as recently viewed. This changes the default behavior. By default (if you do not specify the option), the first 1000 records inserted via the Bulk API will be set as recently viewed. If fewer than 1000 records are inserted, existing objects of the same type being inserted will also be set as recently viewed. (#2578)
- The `update_dependencies` task can now consume 2GP releases in upstream repositories, provided they're stored in release tags as generated by CumulusCI. (#2557)
- The `extract_dataset` and `load_dataset` tasks now support adding or removing a namespace from a mapping file to match the target org for sObjects and not just fields. (#2532)
- The `create_package_version` task can now increment package version numbers when the package is not in a released state. (#2547)
- Includes [Snowfakery 1.10](#) with upgrades to its Fake data functions.

#### Issues Closed

- Fixed an error in the `github_automerge_main` task when using a branch prefix that doesn't contain a slash. (#2582)
- Fixed logic in the `push_sandbox` and `push_all` tasks which was selecting the wrong package versions. (#2577)
- Improved logging of errors from sfdx while converting sfdx format metadata to deploy via the Metadata API, so that they are not lost when CumulusCI is embedded in another system like MetaCI or Metecho. (#2574)

### 16.1.14 3.33.1 (2021-04-20)

#### Changes:

- The `create_package_version` task now accepts an `--ancestor-id` option to specify the 04t Id of the package version that should be considered the ancestor of a new managed package version. The option can also be set to `latest_github_release` to look up the 04t Id of the project's most recent release on GitHub. (#2540)

#### Issues closed:

- Fixed a regression where the `release_beta` flow would throw an error if the project has unmanaged github dependencies. (#2566)
- Fixed a regression where the `cci service connect` command could no longer connect a service without giving it a name. Now a default name will be assigned. (#2568)
- Fixed a regression when resolving unpackaged dependencies from GitHub releases. (#2571)
- Fixed a regression with creating a scratch org if the devhub service was configured but not set as the default. (#2570)
- Improved the formatting of `cumulusci.yml` validation warnings. (#2567)

### 16.1.15 3.33.0 (2021-04-19)

#### Critical Changes:

- CumulusCI's dependency management modules have been rewritten. This grants new capabilities and removes some existing features. (#2456)
  - All package installations now perform retries if the package is not yet available.
  - Package installations are also retried on common row locking errors.
  - You can now obtain fine-grained control over how your projects resolve dependencies. It's much easier to control where your application uses beta managed packages and second-generation packages to satisfy dependencies.
  - You can now execute 2GP builds that use 2GPs from upstream feature branches matching your current branch, not just release branches.
  - The `update_dependencies` task no longer supports uninstalling managed packages in a persistent org as part of the dependency installation process.
  - The `update_dependencies` task no longer supports the `allow_newer` option, which is always `True`.
  - The install order of `update_dependencies` changes slightly where multiple levels of upstream dependency have `unpackaged/pre` metadata. Where previously one package's `unpackaged/pre` might be installed prior to its own upstream dependency, `unpackaged/pre` will now always be installed immediately prior to the repo's package.
  - Projects using unmanaged dependencies that reference GitHub subfolders will see a change in resolution behavior. Previously, a dependency specified like this:

```
dependencies:
  - github: https://github.com/SalesforceFoundation/NPSP
    subfolder: unpackaged/config/trial
```

would always deploy from the latest commit on the default branch. Now, this dependency will be resolved to a GitHub commit just like a dependency without a subfolder, selecting the latest beta or production release as determined by the chosen resolution strategy.

- The `project__dependencies` section in `cumulusci.yml` no longer supports nested dependencies specified like this:

```
dependencies:
  - namespace: "test"
    version: "1.0"
    dependencies:
      - namespace: "parent"
        version: "2.2"
```

All dependencies should be listed in install order.

#### Changes:

- CumulusCI now supports named services! This means you can configure multiple services of the same *type* under different names. If you run `cci service list` you will note that your existing global services will have the name `global`, and any project-specific services will have the name `project_name`. (#2499)
  - You must now specify both a service type and a service name when connecting a new service using `cci service connect`.

- CumulusCI has a new command: `cci service default`. This command sets the default service for a given type.
  - CumulusCI has a new command: `cci service rename`. This command renames a given service.
  - CumulusCI has a new command: `cci service remove`. This command removes a given service.
- A validator now checks `cumulusci.yml` and shows warnings about values that are not expected. (#1624)
- Added a friendly error message when a GitHub repository cannot be found when set as a dependency or cross-project source. (#2535)
- Task option command line arguments can now be specified with either an underscore or a dash: e.g. `clean_meta_xml` can be specified as either `--clean_meta_xml` or `--clean-meta-xml` or `-o clean-meta-xml` (#2504)
- Adjustments to existing tasks:
  - The `update_package_xml` task now supports additional metadata types. (#2549)
  - The `push_sandbox` and `push_all` tasks now use the Bulk API to query for subscriber orgs. (#2338)
  - The `push_sandbox` and `push_all` tasks now default to including all orgs whose status is not Inactive, rather than only orgs with a status of Active. This means that sandboxes, scratch orgs, and Developer Edition orgs are included. (#2338)
  - The `user_alias` option for the `assign_permission_sets`, `assign_permission_set_groups`, and `assign_permission_set_licenses` tasks now accepts a list of user aliases, and can now create permission assignments for multiple users with a single task invocation. (#2483)
  - The `command` task now sets the `return_values` to a dictionary that contains the return code of the command that was run. (#2453)
- Data generation with Snowfakery:
  - Updated to [Snowfakery 1.9](#) (#2538)
- Robot Framework:
  - The `run` task keyword now includes all task output in the robot log instead of printing it to stdout. (#2453)
  - Documented the use of the options/options section of CumulusCI for the `robot` task. (#2536)
- Changes for CumulusCI developers:
  - Tasks now get access to the `--debug-mode` option and can output debugging information conditional on it. (#2481)
- `cci org connect` can now connect to orgs running in an internal build environment with a different port. (#2501, with thanks to @force2b)

#### Issues Closed:

- The `load_custom_settings` task now resolves a relative `settings_path` correctly when used in a cross-project flow. (#2523)
- Fixed the `min_version` option for the `push_sandbox` and `push_all` tasks to include the `min_version` and not only versions greater than it. (#2338)

### 16.1.16 3.32.1 (2021-04-01)

April Fool's! This is the real new release, because there was a packaging problem with 3.32.0.

### 16.1.17 3.32.0 (2021-04-01)

Changes:

- A new task, `create_network_member_groups`, creates `NetworkMemberGroup` records to grant specified Profiles or Permissions Sets access to an Experience Cloud site (community). (#2460, thanks @ClayTomerlin)
- A new preflight check task, `get_existing_sites`, returns a list of existing Experience Cloud site names in the org. (#2493)
- It is now possible to create a flow which runs the same sub-flow multiple times, as long as they don't create a self-referential cycle. (#2494)
- Improvements to support for releasing 2nd-generation (2GP) packages:
  - The `github_release` task now includes the package version's 04t id in the message of the tag that is created. (#2485)
  - The `promote_package_version` task now defaults to promoting the package version corresponding to the most recent beta tag in the repository, if `version_id` is not specified explicitly. (#2485)
  - Added a new flow, `release_2gp_beta`, which creates a beta package version of a 2GP managed package and a corresponding tag and release in GitHub. (#2509)
  - Added a new flow, `release_2gp_production`, which promotes a 2gp managed package version to released status and creates a corresponding tag and release in GitHub. (#2510)
- Data generation with Snowfakery:
  - Updated to [Snowfakery 1.8.1](#) (#2516)
  - Snowfakery can now use "load files" to provide hints about how objects should be loaded.
  - Values for the `bulk_mode`, `api`, and `action` parameters in mapping files are now case insensitive.
- Robot Framework:
  - Added a new keyword, `Input Form Data`, for populating form fields of many different types. This keyword is considered experimental but is intended to eventually replace `Populate Form`. (#2496)
  - Added a new keyword, `Locate Element by Label`, for finding form inputs using their label. (#2496)
  - Added a custom locator strategy called `label` which uses `Locate Element By Label` (e.g. `label:First Name`). (#2496)
  - Added two new options to the robot task: `ordering` and `testlevelsplits`. These only have an effect when combined with the `processes` option to run tests in parallel.

Issues Closed:

- The `cci org import` command now shows a clearer error message if you try to import an org that is not a locally created scratch org. (#2482)

### 16.1.18 3.31.0 (2021-03-18)

#### Changes:

- It is now possible to pass the `--noancestors` flag to `sfdx` when creating a scratch org by setting `noancestors: True` in the scratch org config in `cumulusci.yml`. Thanks @lionelarmant (#2452)
- The `robot_outputdir` return value from the `robot` task is now an absolute path. (#2442)
- New tasks:
  - `get_available_permission_sets`: retrieves the list of available permission sets from an org. (#2455)
  - `promote_2gp_package`: will promote a `Package2Version` to the “IsReleased” state, making it available for installation in production orgs. (#2454)

#### Snowfakery 1.7:

- Adds support for Salesforce Person Accounts.

#### Issues Closed:

- `cci project init` no longer overwrites existing files. If files already exist, it displays a warning and outputs the rendered file template. (#1325)

### 16.1.19 3.30.0 (2021-03-04)

#### Critical changes:

- We are planning to remove functionality in CumulusCI’s dependency management in a future release.
  - The `update_dependencies` task will no longer support uninstalling managed packages in a persistent org as part of the dependency installation process.
  - The `allow_newer` option on `update_dependencies` will be removed and always be `True`.
  - The `project__dependencies` section in `cumulusci.yml` will no longer support nested dependencies specified like this

```
dependencies:
  - namespace: "test"
    version: "1.0"
    dependencies:
      - namespace: "parent"
        version: "2.2"
```

All dependencies should be listed in install order.

We recommend reformatting nested dependencies and discontinuing use of `allow_newer` and package uninstalls now to prepare for these future changes.

#### Changes:

- We released a [new suite of documentation for CumulusCI](#).
- CumulusCI now caches org describe data in a local database to provide significant performance gains, especially in `generate_dataset_mapping`.
- The `cci org browser` command now has a `--path` option to open a specific page and a `--url-only` option to output the login URL without spawning a browser.
- We improved messaging about errors while loading `cumulusci.yml`.



- CumulusCI now uses Snowfakery 1.6 (see its [release notes](#)).

### 16.1.20 3.29.0 (2021-02-18)

Changes:

- The message shown at the end of running a flow now includes the org name. #2390, thanks @Julian88Tex
- Added new preflight check tasks:
  - `get_existing_record_types` checks for existing Record Types. #2371, thanks @ClayTomerlin
  - `get_assigned_permission_sets` checks the current user's Permission Set Assignments. #2386
- The `generate_package_xml` task now supports the Muting Permission Set metadata type. #2382
- The `uninstall_packaged_incremental` and `uninstall_packaged` tasks now support a `dry_run` option, which outputs the destructiveChanges package manifest to the log instead of executing it. #2393
- Robot Framework:
  - The `Run Task` keyword now uses the correct project config when running a task from a different source project. #2391
  - The `SalesforceLibrary` has a new keyword, `Scroll Element Into View`, which is more reliable on Firefox than the keyword of the same name in `SeleniumLibrary`. #2391

Issues closed:

- Fixed very slow `cci org connect` on Safari. #2373
- Added a workaround for decode errors that sometimes happen while processing cci logs on Windows. #2392
- If there's an error while doing JWT authentication to an org, we now log the full response from the server. #2384
- Robot Framework: Improved stability of the `ObjectManagerPageObject`. #2391

### 16.1.21 3.28.0 (2021-02-04)

Changes:

- Added a new task, `composite_request`, for calling the Composite REST Resource. #2341
- The `create_package_version` task has a new option, `version_base`, which can be used to increment the package version from a different base version instead of from the highest existing version of the 2gp package. The `build_feature_test_package` flow now uses this option to create a package version with the minor version incremented from the most recent 1gp release published to github. #2357
- The `create_package_version` task now supports setting a post-install script and uninstall script when creating a managed package version, by setting the `post_install_script` and `uninstall_script` options. By default, these options will use the values of `install_class` and `uninstall_class` from the package section of `cumulusci.yml`. #2366
- Updated to [Snowfakery 1.5](#).
- Robot Framework:
  - The `Click related list button` keyword has been modified to be more liberal in the types of DOM elements it will click on. Prior to this change it only clicked on anchor elements, but now also works for related list buttons that use an actual button element. #2356
  - The `Click modal button` keyword now attempts to find the given button anywhere on the modal rather than only inside a `force-form-footer` element. #2356

Issues closed:

- Robot Framework:
  - Custom locators can now be used with keywords that expect no element to be found (such as `Page should not contain`). This previously resulted in an error. #2346
  - Fixed an error when setting the `tagstatexclude` option for the robot task. #2365
- Fixed a possible error when running CumulusCI flows embedded in a multi-threaded context. #2347

### 16.1.22 3.27.0 (2021-01-21)

Changes:

- Snowfakery 1.4 which includes min, max, round functions. PR #2335
- The `ensure_record_types` task has a new option, `force_create`, which will create the Record Type even if other Record Types already exist on the object. (Thanks to @bethbrains) PR #2323
- Allow `num_records` and `num_records_tablename` to be omitted when using the task `generate_and_load_from_yaml`. PR #2322
- Added a new Metadata ETL task, `add_fields_to_field_set` which allows adding fields to existing field sets. (Thanks to @bethbrains) PR #2334
- `org_settings` now accepts a dict option called `settings` in addition to (or instead of) the existing `definition_file` option. (Thanks to @bethbrains) PR #2337
- New Robot Keywords for Performance Testing: #2291
  - Set Test Elapsed Time: This keyword captures a computed rather than measured elapsed time for performance tests.
  - Start Perf Time, End Perf Time: start a timer and then store the result.
  - Set Test Metric: store any test metric, not just elapsed time.
- CumulusCI now reports how long it took for flows to run. #2249

Issues Closed:

- Fixed an error that could occur while cleaning cache directories.
- Fixed potential bugs in the Push Upgrade tasks.
- CumulusCI displays more user friendly error message when encountering parsing errors in `cumulusci.yml`. #2311
- We fixed an issue causing the `extract_dataset` task to fail in some circumstances when both an anchor date and Record Types were used. #2300
- Handle a possible gack while collecting info about installed packages #2299

### 16.1.23 3.26.0 (2021-01-08)

#### Changes:

- CumulusCI now reports how long it took for flows to run.
- Flows `ci_feature` and `ci_feature_beta_deps` now only run the `github_automerge_feature` task if the branch begins with the configured feature branch prefix.
- Running the `deploy` task with the `path` option set to a path that doesn't exist will log a warning instead of raising an error.
- When the `ci_feature_2gp` and `qa_org_2gp` flows install dependencies, the latest beta version will be used when available.
- CumulusCI can now resolve dependencies using second-generation packages (2GPs) for upstream projects. When a `ci_feature_2gp` or `qa_org_2gp` flow runs on a release branch (starting with `prefix/NNN`, where `prefix` is the feature branch prefix and `NNN` is an integer), CumulusCI will look for a matching release branch in each upstream dependency and use a 2GP package build on that release branch, if present, falling back to a 1GP beta release if not present.

#### Issues Closed:

- Fixed the `org_settings` task to handle nested structures in org settings.
- Fixed a bug where `cci` task run could fail without a helpful error if run outside of a `cci` project folder.
- Fixed an issue that caused CumulusCI to generate invalid `package.xml` entries for Metadata API-format projects that include `__mocks__` or `__tests__` LWC directories.
- Fixed the `update_dependencies` task to handle automatic injection of namespace prefixes when deploying an unpackaged dependency. The fix for the same issue in CumulusCI 3.25.0 was incomplete.
- Fixed an issue where an unquoted `anchor_date` in bulk data mapping failed validation.
- CumulusCI now handles an error that can occur while collecting info about installed packages
- Fixed an issue causing the `extract_dataset` task to fail in some circumstances when both an anchor date and Record Types were used.
- Fixed an issue where the deprecated syntax for record types was not working.

### 16.1.24 3.25.0 (2020-12-10)

#### Changes:

- New tasks:
  - `assign_permission_set_groups` assigns Permission Set Groups to a user if not already assigned.
  - `assign_permission_set_licenses` assigns Permission Set Licenses to a user if not already assigned.
- New preflight checks for use with MetaDeploy install plans:
  - `check_enhanced_notes_enabled` checks if Enhanced Notes are enabled
  - `check_my_domain_active` checks if My Domain is active
- The `github_copy_subtree` task has a new option, `renames`, which allows mapping between local and target path names when publishing to support renaming a file or directory from the source repository in the target repository.
- The `ensure_record_types` task has a new option, `record_type_description`, which can be used to set the description of the new record type if it is created.

- Robot Framework:
  - New keyword `Field value` should be
  - New keyword `Modal` should show edit error for fields to check form field error notifications in Spring '21
  - Adjusted `Get field value` and `Select dropdown value` fields to work in Spring '21
- Command line improvements:
  - The various `cci org` commands now accept an org name with the `--org` option, for better consistency with other commands. Specifying an org name without `--org` also still works.
  - Running `cci org default` without specifying an org name will now display the current default org.
- Org configs now have properties `org_config.is_multiple_currencies_enabled` and `org_config.is_advanced_currency_management_enabled` which can be used to check if these features are enabled.
- The `MergeBranchOld` task, which was previously deprecated, has now been removed.

Issues closed:

- Fixed the `update_dependencies` task to handle automatic injection of namespace prefixes when deploying an unpackaged dependency.
- Fixed the `query` task, which was completely broken.
- Fixed the `connected_app` task to pass the correct username to sfdx. Thanks @atrancadoris
- Fixed the display of task options with an underscore in `cci task info` output.
- Fixed a confusing warning when creating record types using Snowfakery. (#2093)
- Improved handling of errors while deleting a scratch org.

### 16.1.25 3.24.1 (2020-12-01)

Issues Closed:

- Fixed a regression that prevented running unmanaged flows on persistent orgs, due to the use of the `include_beta` option while installing dependencies, which is not allowed for persistent orgs. We changed the `update_dependencies` task to ignore the option and log a warning when running against a persistent org, instead of erroring.

### 16.1.26 3.24.0 (2020-11-30)

Critical Changes:

- The flows `dev_org`, `dev_org_namespaced`, `qa_org`, `ci_feature`, and `install_beta` now run the `update_dependencies` task with the `include_beta` option enabled, so dependencies will be installed using the most recent beta release instead of the most recent final release. The `beta_dependencies` flow is no longer used and is considered deprecated.
- The flows `ci_feature_beta_deps` and `dev_org_beta_deps` are now deprecated and should be replaced by their default equivalents above.
- The `ci_feature_2gp` flow has been changed to use `config_apextest` instead of `config_managed` to avoid configuration steps that are unnecessary for running Apex tests. This means that in order for `ci_feature_2gp` to work, `config_apextest` must be set up to work in both managed and unmanaged contexts.

- When connecting GitHub using `cci service connect github`, we now prompt for a personal access token instead of a password. (GitHub has removed support for accessing the API using a password as of November 2020.) If you already had a token stored in the `password` field, it will be transparently migrated to `token`. If you were specifying `--password` on the command line when running this command, you need to switch to `--token` instead.
- Removed the old `cumulusci.tasks.command.SalesforceBrowserTest` task class which has not been used for some time.

#### Changes:

- Added a standard `qa_org_2gp` flow, which can be used to set up a QA org using a 2nd-generation package version that was previously created using the `build_feature_test_package` flow. This flow makes use of the `config_qa` flow, which means that `config_qa` must be set up to work in both managed and unmanaged contexts. This flow is considered experimental and may change at any time.
- The `batch_apex_wait` task can now wait for Queueable Apex jobs in addition to batch Apex.
- The `custom_settings_value_wait` task now waits if the expected Custom Settings record does not yet exist, and does case insensitive comparison of field names.
- Preflight checks:
  - Added a task, `check_sobject_permissions`, to validate sObject permissions.
  - Added a task, `check_advanced_currency_management`, to determine whether or not Advanced Currency Management is active.
- Robot Framework:
  - In the Robot Framework Salesforce resource, the `Open Test Browser` keyword now accepts an optional `useralias` argument which can be used to open a browser as a different user. The user must already have been created or authenticated using the Salesforce CLI.
- Updated to [Snowfakery 1.3](#).

#### Issues Closed:

- Improved error handling of REST API responses to confirm they are JSON.
- Fixed error handling in the `load_dataset` task in Windows.
- Fixed a bug where pressing Ctrl+C while running `cci org connect` in Windows did not exit. (#2027)
- Fixed a bug where deploying an LWC component bundle using the `deploy` task did not include files in subfolders.
- Fixed the `deploy` task so that deploying an empty metadata directory does not error.
- Fixed a bug where the `namespace_inject` option was not included when freezing deploy steps for MetaDeploy, causing namespace injection to not work when running the plan in MetaDeploy.
- Fixed a bug where running the `robot` task as a cross-project task could not load Robot Framework libraries from the other project.

### 16.1.27 3.23.0 (2020-11-12)

#### Changes:

- CumulusCI now accepts a normalized task option syntax in the form of: `--opt-name value`. This can be used in place of the old task option syntax: `-o opt-name value`.
- Tasks which perform namespace injection can now automatically determine whether they are running in the context of a managed installation or a namespaced scratch org. This means that in many cases it is no longer necessary to explicitly specify options like `managed/unmanaged/namespaced/namespaced_org/namespace_inject`, or to use a separate flow for namespaced scratch orgs.
- The `deploy_unmanaged` flow now deploys sfdx-formatted metadata using the Metadata API rather than the `sfdx force:source:push` command. This avoids an issue where sfdx could show an error about the pushed components conflicting with other changes that already happened in the org. It also improves consistency between how metadata is deployed to a scratch org and how it is deployed to a packaging org.
- Removed the `namespaced_org` option for the `update_dependencies` task, which was not functional.
- We added support for including SOQL where-clauses Salesforce Query Robot keyword via the `where` keyword argument.
- The `create_package_version` task can accept a `static_resource_path` option.
- The FindReplace task now has a `replace_env` option which, if true, will interpret the `replace` option as the name of an environment variable whose value should be used for the replacement.
- We added a new command, `cci project doc`, which will document project-specific tasks to a reStructuredText file.

#### Issues closed:

- An error that occurred when building a second-generation package using a cross-project task has been fixed.
- The `github_package_data` task will now work for projects using API versions prior to 44.0.
- Fixed a bug where namespace injection of the `%%%NAMESPACEED_ORG%%%` token with the `namespaced_org` option enabled did not actually add the namespace prefix unless the `managed` option was also enabled.
- We fixed an issue that resulted in the `batch_size` option in a data mapping file being ignored.

### 16.1.28 3.22.0 (2020-10-29)

#### Changes:

- We added support for using Robot keywords from other projects that are included as sources. - The `suites` option of the robot task can now take a list of suite paths. Paths can include a prefix representing a remote repository as defined by the `sources` configuration option (eg: `-o suites npsp:robot/Cumulus/tests/api`) - The robot task has a new `sources` option to work in conjunction with the global `sources` option to allow the use of keywords and tests from other repositories. - When running the robot task, the folder containing downloaded repositories via the `sources` option are added to `PYTHONPATH` so that robot tests can find library and resource files in those repositories
- Bulk Data tasks now support adding or removing a namespace from a mapping file to match the target org.
- We improved how we parse Boolean values in Bulk Data tasks and in command line options. True can be represented as “yes”, “y”, “true”, “on”, or “1”, with any capitalization, and False as “no”, “n”, “false”, “off”, “0”. None as a synonym for False is deprecated.
- We added support for including managed package release details in automatically generated release notes.
- We added a task, `assign_permission_sets`, to assign Permission Sets to a user.

- We updated the default API version for new projects to 50.0.
- The `build_feature_test_package` flow now creates a 2GP package version with the “skip validation” option turned on.
- `github_automerge_main` now only merges to the lowest numbered release branch when multiple are detected.

Issues closed:

- We fixed an issue with relative imports within parallel Robot test runs by adding the repo root to `PYTHONPATH`.
- We fixed an issue with generating `package.xml` manifests for directories that contain reports in folders that aren't owned by the project.
- We now handle an exception that may occur while creating merge conflict PRs during parent-child automerges.

### 16.1.29 3.21.1 (2020-10-19)

Issues closed: - Added a workaround for a slow query error while looking up installed packages in Winter '21 orgs.

### 16.1.30 3.21.0 (2020-10-15)

Changes:

- The `update_admin_profile` task now accepts the `api_names` option to target extra Profiles, even when using a custom `package.xml`.
- The `github_automerge_main` task can now be used on source branches other than the default branch to merge them into branches starting with the `branch_prefix` option, as long as the source branch does not also start with `branch_prefix`.
- Added preflight check tasks to validate org settings (`check_org_settings_value`) and to check that Chatter is enabled (`check_chatter_enabled`). These are intended for use with MetaDeploy install plans.
- Updated to [Snowfakery 1.2](#).

Issues closed:

- Fixed an issue in the `load_dataset` task which left out non-Person-Account Contacts if the dataset was extracted using the REST API.

### 16.1.31 3.20.1 (2020-10-05)

Issues closed:

- Fixed a bug introduced in CumulusCI 3.20.0 in which the `upload_beta` and `upload_production` tasks could hit a connection error if uploading the package took over 10 minutes.
- We corrected edge cases in how we processed Boolean options for the `custom_settings_wait`, `exec_anon`, and `uninstall_post` tasks. (Thanks to @davidjray)

### 16.1.32 3.20.0 (2020-09-30)

#### Critical Changes:

- We've removed the standard flow: `retrieve_scratch`. The recommended way for retrieving source-tracked changes is to use the `retrieve_changes` task.
- Changes to automatic merging:
  - The `github_master_to_feature` task has been renamed to `github_automerge_main`. It still merges changes from the default branch to feature branches. In the case of an orphaned feature branch (a branch with a name like `feature/parent__child` where `feature/parent` does not exist as its own branch), the `github_automerge_main` branch will no longer merge to the orphaned branch.
  - The `github_parent_to_children` task has been renamed to `github_automerge_feature`. It still merges changes from feature branches to their children (e.g. `feature/parent` would be merged to `feature/parent__child`). It is now possible to use multiple double-underscores to create more deeply nested children, and the task will only merge to the next level (e.g. `feature/parent` would merge to `feature/parent__child` which would merge to `feature/parent__child__grandchild`).
  - The `children_only` option for these tasks has been removed. The strategy for picking which branches to target for merging is now determined by the `source_branch`.

#### Tasks, Flows, and Automation:

- `cci flow list` now displays flows in different groups that are organized by functional area. (This is similar to how `cci task list` currently works).
- The `insert_record` task can now be used against the Tooling API. We clarified that this task can accept a dict of values if configured in `cumulusci.yml`.
- Added support for newer metadata types to the `update_package_xml` task.
- Previously, large data loads and extracts would use enormous amounts of memory. Now they should use roughly constant amounts of memory.
- Adjusted tasks: `install_managed` and `update_dependencies` can now install packages from just a version id (04t).
- Added support for creating 2GP packages (experimental)
  - New task: `github_package_data` gets a package version id from a GitHub commit status. It is intended primarily for use as part of the `ci_feature_2gp` flow. Implementation details can be found in the [features](#) section of the documentation.
  - New task: `create_package_version` - Builds a 2gp package (managed or unlocked) via a Dev Hub org. Includes some automated handling of dependencies:
  - New Flow: `build_feature_test_package` - Runs the `create_package_version` task, and in the context of MetaCI it will set a commit status with the package version id.
  - New Flow: `ci_feature_2gp` - Retrieves the package version from the commit status set by `build_feature_test_package`, installs dependencies and the package itself in a scratch org, and runs Apex tests. (There is another new task, `github_package_data`, which is used by this flow.)

#### User Experience:

- Improved error messaging when encountering errors during bulk data mapping validation.

#### Issues Closed:

- Fixed a very rare bug that caused CumulusCI to fail to retrieve installed packages from an org when running package-related tasks or evaluating `when` conditional expressions.



- Fixed `UnicodeDecodeError` while opening config files on Windows.
- Fixed a bug in `cumulusci.core.sfdx.sfdx` when `capture_output` is `False`

### 16.1.33 3.19.1 (2020-09-18)

Issues closed:

- Fixed an issue (#2032) where REST API data loads incorrectly handled Boolean values.

### 16.1.34 3.19.0 (2020-09-17)

Changes:

- Tasks and automation:
  - CumulusCI now supports using the REST Collections API in data load, extract, and delete operations. By default, CumulusCI will select an API for you based on data volume (<2000 records uses the REST API, >=2000 uses Bulk); a desired API can be configured via the mapping file.
  - Removed the `namespace_tokenize` option from tasks that deploy metadata, and removed the `namespace_inject` option from tasks that retrieve metadata, because it's unclear when they would be useful.
  - The task `create_permission_set` allows for creating and assigning a Permission Set that enables specific User Permissions. (Note: other types of permissions are not yet supported).
  - The task `create_bulk_data_permission_set` creates a Permission Set with the Hard Delete and Set Audit Fields permissions for use with data load operations. The org permission to allow Set Audit Fields must be turned on.
  - CumulusCI's `load_dataset` and `extract_dataset` tasks now support relative dates. To take advantage of relative dates, include the `anchor_date` key (with a date in YYYY-MM-DD format) in each mapping step you wish to relativize. On extract, dates will be modified to be the same interval from the anchor date as they are from the current date; on load, dates will be modified to be the same interval from today's date as they are from their anchor. Both date and date-time fields are supported.
- Other:
  - The `oid_as_pk` key is no longer supported in bulk data mappings. (This key was already deprecated). Select object Id mode by including the `Id` field in mappings.

Issues closed:

- Fixed an issue (#2001) that caused CumulusCI to extract invalid data sets when using after: steps with autoincrement primary keys.
- Fixed an issue where the `retrieve_changes` task did not actually retrieve folders.
- Fixed a bug in the `metadeploy_publish` task where labels starting with "Install " were not extracted for localization.
- Fixed a bug that prevented using JWT auth with sandboxes if the sandbox's `instance_url` did not include an instance name.
- Fixed a bug where `cci project init` generated an invalid mapping for bulk data tasks.

### 16.1.35 3.18.0 (2020-09-03)

#### Changes:

- Tasks and automation:
  - CumulusCI now tries 10 times (instead of 5) to install managed package versions, which helps ameliorate timeouts when new versions are released.
  - We added support for CSV files to the `push_list` task.
  - We added a `ref` option to `github_copy_subtree` to allow publishing a git reference (commit hash, branch, or tag).
  - Changed the `disable_tdtm_trigger_handlers` (`SetTDTMHandlerStatus`) task so that trigger handler state is remembered in the cache directory instead of `REPO_ROOT`.
- User experience:
  - The `cci error info` command now defaults to showing the entire traceback when it is more than 30 lines.
- Robot Framework:
  - The following robot keywords have been updated to work with Winter '21:
    - \* `Load related list`
    - \* `Click related list button`
    - \* `Click related item link`
    - \* `Click related item popup link`
    - \* `Go to object home`
    - \* `Go to object list`
    - \* `Go to record home`
    - \* `Populate lookup field`
  - The keyword `Load related list` has been rewritten to be slightly more efficient. It also has a new parameter `tries` which can be used if the target is more than 1000 pixels below the bottom of the window.

#### Issues Closed:

- Fixed a bug where `cci error gist` could throw a `UnicodeDecodeError` on Windows (fixes #1977)
- Fixed a bug where `cci org list` could throw a `TypeError` when run outside a project directory (fixes #1998)
- The `metadeploy_publish` task can now update translations for language codes with more than 2 letters.
- Fixed a bug where the `extract_dataset` task could fail with a `UnicodeEncodeError` on Windows.
- `update_dependencies` deduplicates its package install list, making it possible to handle situations where the same beta package is reached by two dependency paths.

### 16.1.36 3.17.0 (2020-08-20)

#### Changes:

- Tasks and automation:
  - We added the `upload_user_profile_photo` and `upload_default_user_profile_photo` tasks, which allow for setting Users' profile photos from images stored in the repository. (Thanks to @spelak-salesforce).
  - We added the property `is_person_accounts_enabled` to the `org_config` object, which is available in `when` clauses. (Thanks to @spelak-salesforce).
- Policies and inclusive language:
  - We added information about Salesforce's Open Source Community Code of Conduct and Security policies.
  - We updated documentation to more consistently refer to the "main" branch, reflecting CumulusCI's support for per-project specification of main branches other than `master`.
- User experience:
  - We modified how we handle situations where the default org is not valid for better user experience.
  - We catch a common mistake in entering command-line options (`-org` instead of `--org`, as well as incorrectly-formatted flow options) and show a clearer error.
  - We now capture and display the `InstanceName` of orgs in `cci org list`'s output.
- Robot Framework:
  - We now cleanly fall back to the latest available API version for Robot locators if the newest API version does not have an available locator file. This change helps support Robot testing on the latest prerelease editions of Salesforce.
  - We included some updates to locators for API version 50.0.
- Other:
  - We added a new environment variable, `SFDX_SIGNUP_INSTANCE`, and an `instance` key in org definitions, to specify a preferred instance routing. NOTE: this functionality requires Dev Hub permissions that are not Generally Available.

#### Issues closed:

- Fixed a bug which prevented package install links from getting added to release notes.
- Fixed a bug (#1914) which caused errors when customizing some Flow steps with decimal step numbers.
- Fixed a bug making it difficult to troubleshoot issues with Snowfakery and CumulusCI on Windows.
- Fixed a bug in `update_admin_profile` that resulted in errors when attempting to manage Record Types across multiple objects.

### 16.1.37 3.16.0 (2020-08-06)

#### Changes:

- Project initialization:
  - When starting a new CumulusCI project, the `cci project init` command now uses the current git branch as the project's default branch.
  - API version 49.0 is now set as the default for new projects.
- Bulk data tasks:
  - Added a task called `delete_data` for deleting all data from specified objects. This was previously available but required manually adding it to `cumulusci.yml`
  - The `load_dataset`, `extract_dataset`, and `delete_data` tasks now support automatic namespace injection. When object and field names are specified without namespaces, but the target org only has them with a namespace prefix attached, CumulusCI automatically adds the namespace prefix. This makes it easier for projects to use a single mapping file for unmanaged orgs, namespaced scratch org, and managed orgs.

This behavior is on by default, but may be disabled by setting the `inject_namespaces` option to `False`. This feature is believed to be backwards-compatible; however, projects that subclass built-in data loading classes, or which use data loading tasks in very unusual ways, might be impacted.

- The `load_dataset` and `extract_dataset` tasks have a new option, `drop_missing_schema`. When enabled, this option causes CumulusCI to silently ignore elements in a dataset or mapping that are not present in the target org. This option is useful when building datasets that support additional, optional managed packages or features, which may or may not be installed.
  - The `extract_dataset` and `load_dataset` tasks now support Person Accounts. These will be handled automatically as long as both Account and Contact are in the mapping file. Additional fields should be added to the Account mapping rather than Contact. Thanks @spelak-salesforce
  - The `generate_dataset_mapping` task generates mappings in line with the latest revisions of load/extract functionality: fields are specified as a list, the `table` key is omitted, and namespaces are stripped.
  - The `generate_dataset_mapping` has improved logic for resolving reference cycles between objects. If one of the lookup fields is nillable, the object with that field will be listed first in the generated mapping file.
  - The `generate_and_load_from_yaml` task has a new option, `working_directory`, which can be used to keep temporary files for debugging. The `debug_dir` option has been removed.
- Robot Framework:
  - The `robot` task has a new option, `processes`. If the value is `> 1`, tests will be run in parallel in the given number of processes, using `pabot`. Note: It's still up to the test author to make sure the tests won't conflict with each other when running in parallel. This feature is considered experimental.
  - Added an `ObjectManager` page object for interacting with the Object Manager in Setup. Thanks to @rjan-janam
  - `RequestsLibrary` is now included as a way to test REST APIs from Robot Framework.
- Metadata ETL:
  - Added a new task, `set_field_help_text`, which can be used to update Help Text values on existing fields.
  - Added a new task, `update_metadata_first_child_text`, which can be used to update a single value in existing metadata. Thanks @spelak-salesforce

- Added a new task, `assign_compact_layout`, which can update a compact layout assignment in existing object metadata. Thanks @spelak-salesforce
- Added a new task, `github_copy_subtree`, to allow publishing selected files or folders to another repository after a release. This allows publishing a subset of your project's code from a private repository to a public one, for example.
- The `create_community` task has a new option, `skip_existing`. When True, the task will not error if a community with the specified name already exists.
- The `release_beta` and `release_production` flows now generate a section in the release notes on GitHub including package install links.
- Task options can now use `$project_config` substitutions in any position, not just at the start of the value.

Issues closed:

- Fixed a bug where changes to global orgs would be saved as project-specific orgs.
- Fixed a bug where `cumulusci.yml` could fail to parse if certain options were specified in `cci project init` (#1780)
- The `install_managed` task now recognizes an additional error message that indicates a package version has not yet finished propagating, and performs retries appropriately.
- Fixed a bug in the logic to prevent installing beta packages in non-scratch orgs.
- Fixed a bug where the `list_changes`, `retrieve_changes`, and `snapshot_changes` tasks could error while trying to reset sfdx source tracking.
- Fixed a bug where the `push_failure_report` task could be missing some failed orgs if there were more than 200 errors.
- Fixed a bug where the `github_release_notes` task could list a change note under a wrong subheading from a different section.
- Fixed freezing of command tasks for MetaDeploy.

Internal changes (these should not affect you unless you're interacting with CumulusCI at the Python level):

- Standardized naming of different levels of configuration:
  - `BaseGlobalConfig` is now `UniversalConfig`.
  - `BaseGlobalConfig.config_global_local_path` is now `UniversalConfig.config_global_path`
  - `BaseGlobalConfig.config_global_path` is now `UniversalConfig.config_universal_path`
  - `BaseProjectConfig.global_config_obj` is now `universal_config_obj`
  - `BaseProjectConfig.config_global` is now `config_universal`
  - `BaseProjectConfig.config_global_local` is now `config_global`
  - `EncryptedFileProjectKeychain.config_local_dir` is now `global_config_dir`
  - `BaseCumulusCI.global_config_class` is now `universal_config_class`
  - `BaseCumulusCI.global_config` is now `universal_config`
- Added `UniversalConfig.cumulusci_config_dir` as a central way to get the path for storing configuration. `UniversalConfig.config_local_dir` was removed.
- `OrgConfigs` now keep track of which keychain they were loaded from, and have a new `save` method which is the preferred API for persisting updates to the config.

### 16.1.38 3.15.0 (2020-07-09)

#### Changes:

- The `run_tests` task now defaults to only logging tests that failed. Set the `verbose` option to `True` to see all results including tests that passed.
- The `update_dependencies` task now supports an `ignore_dependencies` option, which prevents CumulusCI from processing a specific dependency (whether direct or transitive). This feature may be useful in installers for packages that extend other packages if the installer is not meant to include the base package.
- Improvements to the mapping file for the `extract_dataset` and `load_dataset` tasks:
  - Fields can now be specified as a simple list of Salesforce API names, instead of a mapping. CumulusCI will infer the database column names.
  - Mappings may omit the `table` key and CumulusCI will use the object name.
  - The tasks will check and show an error if mappings do not use a consistent object Id mode.
  - Mappings can now include junction objects with no additional fields.
- The `generate_dataset_mapping` task now has an `include` option to specify additional objects to include in the mapping if they aren't found by the default heuristics.
- Added additional tasks intended for use as preflight checks for MetaDeploy install plans:
  - `check_subjects_enabled` returns a set of available SObject names.
  - `check_org_wide_defaults` returns a boolean indicating whether Organization-Wide Defaults match the specified values.
- The `update_package_xml` task now supports the `MessageChannel` metadata type.
- Adjusted the default rules for the `robot_lint` task.
- CumulusCI can be configured to always show Python stack traces in the case of an error by setting the `show_stacktraces` option to `True` in the `cli` section of `~/.cumulusci/cumulusci.yml`.
- The prompt provided by `cci org shell` now has access to the Tooling API through the keyword `tooling`.
- When using the JWT OAuth2 flow, CumulusCI can be configured to use alternate Salesforce login URLs by setting the `SF_PROD_LOGIN_URL` and `SF_SANDBOX_LOGIN_URL` environment variables.

#### Issues closed:

- Fixed a `UnicodeDecodeError` that could happen while using the `extract_dataset` task on Windows. (#1838)
- Fixed support for the `CustomHelpMenuSection` metadata type in the `update_package_xml` task. (#1832)
- Deleting a scratch org now clears its domain from showing in `cci org list`.
- If you try to use `cci org connect` with a login URL containing `lightning.force.com`, CumulusCI will explain that you should use the `.my.salesforce.com` domain instead.
- Fixed an issue with deriving the Lightning domain from the instance URL for some orgs.

### 16.1.39 3.14.0 (2020-06-18)

#### Changes:

- Added a generic `dx` task which makes it easy to run Salesforce CLI commands against orgs in CumulusCI's keychain. Use the `command` option to specify the `sfdx` command.
- Tasks which do namespace injection now support the `%%NAMESPACE_DOT%%` injection token, which can be used to support references to packaged Apex classes and Record Types. The token is replaced with `ns.` rather than `ns__` (for namespace `ns`).
- Updated to Robot Framework 3.2.1. Robot Framework has a new parser with a few backwards incompatible changes. For details see the [release notes](#).
- The `run_tests` task now gracefully handles the `required_org_code_coverage_percent` option as a string or an integer.
- CumulusCI now logs a success message when a flow finishes running.

#### Issues closed:

- Fixed a regression introduced in CumulusCI 3.13.0 where connections to a scratch org could fail with a Read-Timeout or other connection error if more than 10 minutes elapsed since a prior task that interacted with the org. This is similar to the fix from 3.13.2, but for scratch orgs.
- Show a clearer error message if dependencies are configured in an unrecognized format.

### 16.1.40 3.13.2 (2020-06-10)

#### Issues closed:

- Fixed a regression introduced in CumulusCI 3.13.0 where connections to Salesforce could fail with a Read-Timeout or other connection error if more than 10 minutes elapsed since a prior task that interacted with the org.

### 16.1.41 3.13.1 (2020-06-09)

#### Issues closed:

- Fixed a bug with “after:” steps in the `load_dataset` task.
- Fixed a bug with record types in the `extract_dataset` task.

### 16.1.42 3.13.0 (2020-06-04)

#### Changes:

- A new Metadata ETL task, `add_picklist_entries`, safely adds picklist values to an existing custom field.
- Added the `cci org prune` command to automatically remove all expired scratch orgs from the CumulusCI keychain.
- Improvements to the `cci org shell` command:
  - Better inline help
  - New `query` and `describe` functions
- Scratch org creation will now wait up to 120 minutes for the org to be created to avoid timeouts with more complex org shapes.

- The `generate_data_dictionary` task now has more features for complex projects. By default, the task will walk through all project dependencies and include them in the generated data dictionaries. Other non-dependency projects can be included with the `additional_dependencies` option. The output format has been extensively improved.
- The `run_tests` task supports a new option, `required_org_code_coverage_percent`. If set, the task will fail if aggregate code coverage in the org is less than the configured value. Code coverage verification is available only in unmanaged builds.
- The `install_managed` and `update_dependencies` tasks now accept a `security_type` option to specify whether the package should be installed for all users or for admins only.
- `when` expressions can now use the `has_minimum_package_version` method to check if a package is installed with a sufficient version. For example: `when: org_config.has_minimum_package_version("namespace", "1.0")`
- Robot Framework:
  - Added a new keyword in the modal page objects, `Select_dropdown_value`. This keyword will be available whenever you use the `Wait_for_modal` keyword to pull in a modal page object.

Issues closed:

- Limited the variables available in global scope for the `cci shell` command.
- Tasks based on `BaseSalesforceApiTask` which use the Bulk API now default to using the project's API version rather than 40.0.
- Bulk data tasks:
  - The `extract_dataset` task no longer converts to `snake_case` when picking a name for lookup columns.
  - Improved error message when trying to use the `load_dataset` command with an incorrect record type.
  - Fixed a bug with the `generate_mapping_file` option.

### 16.1.43 3.12.2 (2020-05-07)

Changes:

- Added a task, `set_duplicate_rule_status`, which allows selective activation and deactivation of Duplicate Rules.
- The `create_community` task now retries multiple times if there's an error.
- The `generate_data_dictionary` task now supports multi-select picklist fields and will indicate the related object for lookup fields.
- The `update_package_xml` task now supports the `NavigationMenu` metadata type.

Issues closed:

- In the Salesforce library for Robot Framework, fixed locators for the actions ribbon and app launcher button in Summer '20.
- Fixed the `load_dataset` task so that steps which don't explicitly specify a `bulk_mode` will inherit the option specified at the task level.
- Fixed error handling if an exception occurs within one of the `cci error` commands.
- Fixed error handling if the Metadata API returns a response that is marked as done but also contains an `errorMessage`.



### 16.1.44 3.12.1 (2020-04-27)

Fixed a problem building the Homebrew formula for installing CumulusCI 3.12.0.

### 16.1.45 3.12.0 (2020-04-27)

Changes:

- We've removed the prompt that users see when trying to use a scratch org that has expired, and now automatically recreate the scratch org.
- The `load_dataset` task now automatically avoids creating Bulk API batches larger than the 10 million character limit.
- Robot Framework:
  - When opening an org in the browser, the Salesforce library now attempts to detect if the org was created using the Classic UI and automatically switch to Lightning Experience.
  - The Salesforce library now has preliminary support for Summer '20 preview orgs.
- CumulusCI now directs `simple-salesforce` to return results as normal Python dicts instead of `OrderedDicts`. This should have minimal impact since normal dicts are ordered in the versions of Python that CumulusCI supports, but we mention it for the sake of completeness.

Issues closed:

- Fixed an issue where non-ASCII output caused an error when trying to write to the CumulusCI log in Windows. (#1619)

### 16.1.46 3.11.0 (2020-04-17)

Changes:

- CumulusCI now includes `Snowfakery`, a tool for generating fake data. It can be used to generate and load data into an org via the new `generate_and_load_from_yaml` task.
- Added two new preflight check tasks for use in `MetaDeploy`: `get_available_licenses` and `get_available_permission_set_licenses`. These tasks make available lists of the License Definition Keys for the org's licenses or PSLs.
- The `get_installed_packages` task now logs its result.
- Robot Framework: Added two new keywords (`Get Fake Data` and `Set Faker Locale`) and a global robot variable (`${faker}`) which can be used to generate fake data using the `Faker` library.

Issues closed:

- Fixed an error when loading a dependency whose `cumulusci.yml` contains non-breaking spaces.
- Fixed a `PermissionError` when running multiple concurrent CumulusCI commands in Windows. (#1477)
- Show a more helpful error message if a keychain entry can't be loaded due to a change in the encryption key.
- Fixed the `org_settings` task to use the API version of the org rather than the API version of the package.
- In the Salesforce Robot Framework library, the `Open App Launcher` keyword now tries to detect and recover from an occasional situation where the app launcher fails to load.

### 16.1.47 3.10.0 (2020-04-02)

Changes:

- Added `custom_settings_value_wait` task to wait for a custom setting to have a particular value.
- The `metadeploy_publish` task now has a `labels_path` option which specifies a folder to store translations. After publishing a plan, `labels_en.json` will be updated with the untranslated labels from the plan. Before publishing a plan, labels from other languages will be published to MetaDeploy.

Issues closed:

- Fixed an issue where running subprocesses could hang if too much output was buffered.

### 16.1.48 3.9.1 (2020-03-25)

Issues closed:

- The `batch_apex_wait` task will now detect aborted and failed jobs instead of waiting indefinitely.
- Fixed reporting of errors from Robot Framework when it exits with a return code > 250.
- Fixed an `ImportError` that could happen when importing the new metadata ETL tasks.
- Fixed bugs in how the `set_organization_wide_defaults` and `update_admin_profile` tasks operated in namespaced scratch orgs.
- Show a more helpful error message if CumulusCI can't find a project's repository or release on GitHub. (#1281)
- Fixed the message shown for skipped steps in `cci flow info`.
- Fixed a regression which accidentally removed support for the `bulk_mode` option in bulk data mappings.

### 16.1.49 3.9.0 (2020-03-16)

Critical changes:

- The `update_admin_profile` task can now add field-level permissions for all packaged objects. This behavior is the default for projects with `minimum_cumulusci_version` >= 3.9.0 that are not using the `package_xml` option. Other projects can opt into it using the `include_packaged_objects` option.

The Python class used for this task has been renamed to `ProfileGrantAllAccess` and refactored to use the Metadata ETL framework. This is a breaking change for custom tasks that subclassed `UpdateAdminProfile` or `UpdateProfile`.

- Refactored how CumulusCI uses the Bulk API to load, extract, and delete data sets. These changes should have no functional impact, but projects that subclass CumulusCI's bulk data tasks should carefully review the changes.

Changes:

- New projects created using `cci project init` will now get set up with scratch org settings to:
  - Use the Enhanced Profile Editor
  - Allow logging in as another user
  - `_not_` force relogin after Login-As
- If `cumulusci.yml` contains non-breaking spaces in indentation, they will be automatically converted to normal spaces.
- Bulk data tasks:

- Added improved validation that mapping files are in the expected format.
- When using the `ignore_row_errors` option, warnings will be suppressed after the 10th row with errors.

Issues closed:

- The `github_release` task now validates the `commit` option to make sure it is in the right format.
- If there is an error from `sfdx` while using the `retrieve_changes` task, it will now be logged.

### 16.1.50 3.8.0 (2020-02-28)

Changes:

- The `batch_apex_wait` task can now wait for chained batch jobs, i.e. when one job starts another job of the same class.
- The metadata ETL tasks that were added in `cumulusci` 3.7.0 have been refactored to use a new library, `cumulusci.utils.xml.metadata_tree`, which streamlines building Salesforce Metadata XML in Python. If you got an early start writing custom tasks using the metadata ETL task framework, you may need to adjust them to work with this library instead of `lxml`.

Issues closed:

- Adjusted the `run_tests` task to avoid an error due to not being able to access the symbol table for managed Apex classes in Spring '20. Due to this limitation, CumulusCI now will not attempt to retry class-level concurrency failures when running Apex unit tests in a managed package. Such failures will be logged but will not cause a build failure.
- Corrected a bug in storing preflight check results for MetaDeploy when multiple tasks have the same path.

### 16.1.51 3.7.0 (2020-02-20)

Changes:

- Added a framework for building tasks that extract, transform, and load metadata from a Salesforce org. The initial set of tasks include:
  - `add_standard_value_set_entries` to add entries to a `StandardValueSet`.
  - `add_page_layout_related_lists` to add Related Lists to a Page Layout.
  - `add_permission_set_perms` to add field permissions and Apex class accesses to a Permission Set.
  - `set_organization_wide_defaults` to set the Organization-Wide Defaults for one or more objects and wait for the operation to complete.
- Added a new task `insert_record` to insert a single sObject record via the REST API.
- The `update_admin_profile` task now accepts a `profile_name` option, which defaults to Admin. This allows the task to be used to update other Profiles. (The task class has been renamed to `UpdateProfile`, but can still be used with the old name.)
- Updated to use Metadata API version 48.0 as the default for new projects.
- Robot Framework: Improved documentation for the API keywords in the Salesforce keyword library.

Issues closed:

- Fixed the `cci error info` command. It was failing to load the log from the previous command.
- Fixed a bug where some error messages were not displayed correctly.

- Adjusted the Salesforce Robot Framework keyword library for better stability in Chrome 80.
- Fixed a bug where using SFDXOrgTask to run an sfdx command on a non-scratch org would break with “Must pass a username and/or OAuth options when creating an AuthInfo instance.”
- Fixed a bug where an error while extracting the repository of a cross-project source could leave behind an incomplete copy of the codebase which would then be used by future commands.

### 16.1.52 3.6.0 (2020-02-06)

#### Changes:

- *cci task info* now has Command Syntax section and improved formatting of option information.
- CumulusCI now displays a more helpful error message when it detects a network connection issue. (#1460)
- We’ve added the option *ignore\_types* to the *uninstall\_packaged\_incremental* task to allow all components of the specified metadata type to be ignored without having to explicitly list each one.
- The *FindReplace* task now accepts a list of strings for the *file\_pattern* option.
- If the *DeleteData* task fails to delete some rows, this is now reported as an error.
- Robot Framework: Added a new variable *\$(SELENIUM\_SPEED)* that is used to control the speed at which selenium runs when the *Open Test Browser* keyword is called.

#### Issues Closed:

- Fixed an issue where existing scratch orgs could sometimes not be used in Windows.
- Fixed a regression where *flow info* and *task info* commands could show an error *AttributeError: ‘NoneType’ object has no attribute ‘get\_service’* when trying to load tasks or flows from a cross-project source. (#1529)
- Fixed an issue where certain HTTP errors while running the bulk data tasks were not reported.

### 16.1.53 3.5.4 (2020-01-30)

#### Changes:

- There is a new top level *cci error* command for interacting with errors in CumulusCI
- *cci gist* is now *cci error gist*
- *cci error info* displays the last 30 lines of a stacktrace from the previous *cci* command run (if present).
- Changed the prompt users receive when encountering errors in *cci*.

#### Issues Closed:

- Robot Framework: Reverted a change to the *select\_record\_type* keyword in the Salesforce library to work in both Winter ‘20 and Spring ‘20

### 16.1.54 3.5.3 (2020-01-23)

- Added new features for running Python code (in a file or string) without bringing up an interactive shell. You can now use `-python` and `-script` arguments for the `cci shell` and `cci org shell` commands.
- Added support for up to two optional parameters in Apex anonymous via token substitution.
- The `EnsureRecordTypes` class is now exposed as `ensure_record_types` and correctly supports the Case, Lead, and Solution sObjects (in addition to other standard objects).
- Fixed a bug where the `github_parent_pr_notes` was attempting to post comments on issues related to child pull request change notes.
- Fixed various Robot keyword issues that have been reported for Spring '20.

### 16.1.55 3.5.2 (2020-01-21)

Issues closed:

- Fixed an issue where errors running the `cci gist` command prompt the user to use the `cci gist` command.
- Removed reference to `os.uname()` so that `cci gist` works on Windows.
- Fixed an issue where the `dx_pull` task causes an infinite loop to occur on Windows.

### 16.1.56 3.5.1 (2020-01-15)

Issues closed:

- Fixed an issue that was preventing newlines in output.
- Don't show the prompt to create a gist if the user aborts the process.
- Avoid errors that can happen when trying to store the CumulusCI encryption key in the system keychain using Python's `keyring` library, which can fail on some systems such as CI systems:
  - We fixed a regression that caused CumulusCI to try to load the keychain even for commands where it's not used.
  - We fixed a bug that caused CumulusCI to try to load the keychain key even when using an unencrypted keychain such as the `EnvironmentProjectKeychain`.
- Adjusted some keywords in the Salesforce library for Robot Framework to handle changes in the Spring '20 release.

### 16.1.57 3.5.0 (2020-01-15)

Changes:

- The `load_dataset` task now accepts a `bulk_mode` option which can be set to `Serial` to load batches serially instead of in parallel.
- CumulusCI now stores the logs from the last five executions under `~/ .cumulusci/logs`
- CumulusCI has a new top-level command: `cci gist`. This command creates a secret GitHub gist which includes: The user's current CumulusCI version, current Python version, path to python binary, `sysname` (e.g. Darwin), machine (e.g. x86\_64), and the most recent CumulusCI logfile (`~/ .cumulusci/logs/cci.log`). The command outputs a link to the created gist and opens a browser tab with the new GitHub gist. This can be helpful for sharing information regarding errors and issues encountered when working with cci. This feature

uses a users GitHub access token for creation of gists. If your access token does not have the ‘gist (Create gists)’ scope this command will result in a 404 error. For more info see: <https://cumulusci.readthedocs.io/en/latest/features.html#reporting-error-logs>

- Changed `UpdateAdminProfile` so that it only deploys the modified Admin profile. While it is necessary to retrieve profiles along their associated metadata objects, we don’t need to do that for deployments.
- Added options to the `deploy` task: `check_only`, `test_level`, and `specified_tests`. Run `cci task info deploy` for details. (#1066)

### 16.1.58 3.4.0 (2020-01-09)

Changes:

- Added `activate_flow` task which can be used to activate Flows and Process Builder processes.
- Added two tasks, `disable_tdtm_trigger_handlers` and `restore_tdtm_trigger_handlers`, which can be used to disable trigger handlers for the table-driven trigger management feature of NPSP and EDA.
- In the `load_dataset` task, added a way to avoid resetting the Salesforce Id mapping tables by setting the `reset_oids` option to `False`. This can be useful when running the task multiple times with the same org.
- Added support for a few new metadata types from API versions 47 and 48 in the `update_package_xml` task.
- Added a way for Robot Framework libraries to register custom locators for use by the selenium library.

Issues closed:

- Fixed a bug with freezing the `load_data` task for `MetaDeploy` where it would use an invalid option for `database_url`.
- Fixed a bug in the `github_release_notes` task when processing a pull request with no description. (#1444)
- Fixed inaccurate instructions shown at the end of `cci project init`.

### 16.1.59 3.3.0 (2019-12-27)

Breaking changes:

- Removed tasks which are no longer in use: `mrbelvedere_publish`, `generate_apex_docs`, and `commit_apex_docs`.

Changes:

- Updated Robot Framework Salesforce library to support the Spring ‘20 release.
- Added `remove_metadata_xml_elements` task which can be used to remove specified XML elements from metadata files.
- Updated references to the NPSP repository to use its new name instead of Cumulus.

Issues closed:

- Fixed the error message shown when a task config has a bad `class_path`.
- Fixed a warning when running the command task in Python 3.8.
- When the CumulusCI Robot Framework library calls Salesforce APIs, it will now automatically retry when it is safe to do so. It will also avoid reusing old connections that might have been closed.
- Fixed the `-o debug True` option for the `robot` task.

### 16.1.60 3.2.0 (2019-12-11)

#### Breaking changes:

- We upgraded the SeleniumLibrary for Robot Framework from version 3.3.1 to version 4.1.0. This includes the removal of some deprecated keywords. See the [SeleniumLibrary releases](#) for links to detailed release notes.

#### Changes:

- The `Persistent Orgs` table shown by `cci org list` has been renamed to `Connected Orgs` since scratch orgs will be shown here if they were connected using `cci org connect` instead of created via the Salesforce CLI. This table now shows the org's expiration date, if known.
- Improvements to the `retrieve_changes` task:
  - The task now retrieves only the components that actually changed, not all components listed in `package.xml` in the target directory.
  - Changes can now be retrieved into folders in DX source format. The target directory defaults to `src` if the project is using `mdapi` format or the default entry in `packageDirectories` in `sfdx-project.json` if the project is using `sfdx` format. (Namespace tokenization is not supported in DX format, since there isn't currently a way to deploy DX format source including namespace tokens.)
- Added a task, `load_custom_settings`, to upload Custom Settings defined in YAML into a target org. See [https://cumulusci.readthedocs.io/en/latest/bulk\\_data.html#custom-settings](https://cumulusci.readthedocs.io/en/latest/bulk_data.html#custom-settings) for more info.

#### Issues closed:

- Fixed an issue with how the package upload task logs Apex test failures to make sure they show up in MetaCI.
- Fixed `KeyError: createDate` error when trying to get scratch org info.
- A rare issue where CumulusCI could fail to load the symbol table for a failed Apex test class is now caught and reported.
- CumulusCI now displays the underlying error if it encounters a problem with storing its encryption key in the system keychain.

### 16.1.61 3.1.2 (2019-11-20)

#### Breaking changes:

- We changed the default path for the mapping file created by the `generate_dataset_mapping` task to `datasets/mapping.yml` so that it matches the defaults for `extract_dataset` and `load_dataset`.
- We changed the `extract_dataset` and `load_dataset` tasks to default to storing data in an SQL file, `datasets/sample.sql`, instead of a binary SQLite database file.

#### Changes:

- `run_tests` can now detect and optionally retry two classes of concurrency issues with Apex unit tests. `run_tests` should always report an accurate total of test methods run, in parallel or serial mode.
- Added the task `generate_data_dictionary`. This task indexes the fields and objects created in each GitHub release for the project and generates a data dictionary in CSV format.
- Added a devhub service. This can be used to switch a project to a non-default sfdx Dev Hub using `cci service connect devhub --project`.
- Added a predefined qa scratch org. It uses the same scratch org definition file as the dev org, but makes it easier to spin up a second org for QA purposes without needing to first create it using `cci org scratch`.

- The `database_url` option for the `extract_dataset` and `load_dataset` tasks is no longer required. Either `database_url` or `sql_path` must be specified. If both are specified, the `sql_path` will be ignored.
- Developers can now directly execute CumulusCI from the Python command line using `python -m cumulusci` or `python cumulusci/__main__.py`

Issues closed:

- A problem with how `run_tests` performed Apex test retries when `retry_always` is set to `True` has been corrected.

### 16.1.62 3.1.1 (2019-11-13)

New features:

- After connecting an org with `cci org connect`, the browser now shows the message “Congratulations! Your authentication succeeded.” instead of “OK”
- External GitHub sources can now specify `release: latest`, `release: latest_beta`, or `release: previous` instead of a commit, branch, or tag.
- The `execute_anon` task has been revised to detect when a gack occurred during execution.

Issues closed:

- When importing a scratch org from sfdx using `cci org import`, the org’s days is now set correctly from the org’s actual expiration date. (#1101)
- The package API version from `cumulusci.yml` is now validated to make sure it’s in the “XX.0” format expected by the API. (#1134)
- Fixed an error deploying new setting objects using the `org_settings` task in Winter ‘20.
- Fixed a bug in processing preflight check tasks for MetaDeploy.
- Fixed path handling in the `update_admin_profile` task when run in a cross-project flow.

### 16.1.63 3.1.0 (2019-11-01)

Breaking changes:

- The `metadeploy_publish` task now requires setting `-o publish True` in order to automatically set the Version’s `is_listed` flag to `True`. (This is backwards incompatible in order to provide a safer default.)

New features:

- Python 3.8 is now officially supported.
- Flows can now include tasks or flows from a different project. See [Using Tasks and Flows from a Different Project](#) for details.
- In the `metadeploy_publish` task it is now possible to specify a commit hash with `-o commit [sha]`, instead of a tag. This is useful while MetaDeploy plans are in development.
- Bulk data:
  - Added support for mapping Record Types between orgs (by Developer Name) during bulk data extract and load.
  - Added support for Record Type mapping in the `generate_dataset_mapping` task.
  - Added [new documentation](#) for bulk data tasks.



- Robot Framework:
  - The sample `create_contact.robot` test that is created when initializing a new project with `cci project init` now makes use of page objects.
  - The page objects library has two new keywords, `wait for modal` and `wait for page object`, which wait for a new page object to appear.
  - `cumulusci.robotframework.utils` now has a decorator named `capture_screenshot_on_error` which can be used to automatically capture a screenshot when a keyword fails.
  - Prior to this change, `Go to page Detail Contact` required you to use a keyword argument for the object id (eg: `Go to page Detail Contact object_id=${object_id}`). You can now specify the object id as a positional parameter (eg: `Go to page Detail Contact ${object_id}`).
- `OrgConfig` objects now have a `latest_api_version` property which can be used to check what Salesforce API version is available.

Issues closed:

- Updated the scratch org definition files generated by `cci project init` to the new recommended format for org settings. Thanks to @umeditor for the fix.
- The `create_unmanaged_ee_src` task (part of the `unmanaged_ee` flow) has been revised to remove the Protected setting on Custom Objects, to ensure that projects using this setting can be deployed to an Enterprise Edition org.
- The Salesforce REST API client used by many tasks will now automatically retry requests on certain connection and HTTP errors.
- Fixed an issue where posts to the Metadata API could reuse an existing connection and get a connection reset error if Salesforce had closed the connection.
- Disabled use of PyOpenSSL by the Python requests library, since it is no longer needed in the versions of Python we support.

### 16.1.64 3.0.2 (2019-10-17)

Issues closed:

- Fixed a bug in deploying email templates and dashboards that was introduced in 3.0.1.
- Removed broken `config_qa` flow from the `cci project init` template.

### 16.1.65 3.0.1 (2019-10-16)

New features:

- Added support for new metadata types when generating `package.xml` from a directory of metadata using the `update_package_xml` task.
- The `ci_feature` flow now supports generating change notes for a parent feature branch's pull request from the notes on child pull requests. The parent pull request description will be overwritten with the new notes after a child branch is merged to the parent if the parent pull request has a special label, `Build Change Notes`.
- When running Apex tests with the `run_tasks` task, if there is a single remaining class being run, its name will be logged.
- Apex test failures that happen while uploading a package are now logged.
- In the `robot_libdoc` task, wildcards can now be used in the `path` option.

- Added an `org_settings` task which can deploy scratch org settings from a scratch org definition file.

Issues closed:

- Added a workaround for an issue where refreshing the access token for a sandbox or scratch org could fail if the user's credentials were new and not fully propagated.

### 16.1.66 3.0.0 (2019-09-30)

Breaking change:

- CumulusCI 3.0.0 removes support for Python 2 (which will reach end of life at the end of 2019). If you're still running Python 2 you can use an older version of CumulusCI, but we recommend upgrading to Python 3. See [our installation instructions](#) for your platform.

### 16.1.67 2.5.9 (2019-09-26)

New features:

- Added a Domain column to the list of scratch orgs in `cci org list`. (thanks @bethbrains)
- **Tasks related to Salesforce Communities (thanks @MatthewBlanski)**
  - New `list_community_templates` task
  - New `list_communities` task
  - New `publish_community` task
  - The `create_community` task can now be used to create a community with no URL prefix, as long as one does not already exist.
- **Robot Framework:**
  - **Added keywords for generating a collection of sObjects according to a template:**
    - \* Generate Test Data
    - \* Salesforce Collection Insert
    - \* Salesforce Collection Update
  - **Changes to Page Objects:**
    - \* More than one page object can be loaded at once. Once loaded, the keywords of a page object remain visible in the suite. Robot will give priority to keywords in the reverse order in which they were imported.
    - \* There is a new keyword, `Log Current Page Object`, which can be useful to see information about the most recently loaded page object.
    - \* There is a new keyword, `Get Page Object`, which will return the robot library for a given page object. This can be used in other keywords to access keywords from another page object if necessary.
    - \* The `Go To Page` keyword will now automatically load the page object for the given page.
  - Added a basic debugger for Robot tests. It can be enabled using the `-o debug True` option to the robot task.
- Added support for deploying new metadata types `ProfilePasswordPolicy` and `ProfileSessionSetting`.

Issues closed:

- Fixed a bug where the `batch_apex_wait` task would sometimes fail to conclude that the batch was complete.
- Fixed a bug in rendering tables in Python 2.

### 16.1.68 2.5.8 (2019-09-13)

New features:

- `LoadData` now supports the key action: `update` to perform a Bulk API update job
- `LoadData` now supports an `after: <step name>` on a lookup entry to defer updating that lookup until a dependent sObject step is completed.
- `GenerateMapping` now handles self-lookups and reference cycles by generating `after:` markers wherever needed.

Issues closed:

- Patch selenium to convert `executeScript` to `executeAsyncScript`. This is a workaround for the `executeScript` issue in chromedriver 77.
- A small issue in `QueryData` affecting mappings using `oid_as_pk: False` has been fixed.

### 16.1.69 2.5.7 (2019-09-03)

Breaking changes:

- The `retries`, `retry_interval`, and `retry_interval_add` options have been removed from the `run_tests` task. These were misleading as they did not actually retry failing tests.

New features:

- The `run_tests` task now supports a `retry_failures` parameter. This is a list of regular expressions to match against each unit test failure's message and stack trace; if all failing tests match, the failing tests will be retried serially. Set `retry_always` to `True` to trigger this behavior when any failure matches.
- There is now a default CumulusCI global connected app that can be used to connect to persistent orgs (assuming you know the credentials) without creating a new connected app. It's still possible to configure a custom connected app using `cci service connect connected_app` if more control over the connected app settings is needed.
- When CumulusCI is being run in a non-interactive context it can now obtain an access token for a persistent org using a JWT instead of a refresh token. This approach is used if the `SFDX_CLIENT_ID` and `SFDX_HUB_KEY` environment variables are set. This makes it easier to manage persistent org connections in the context of a hosted service because it's possible to replace the connected app's certificate without needing to obtain new refresh tokens for each org.

Issues closed:

- Fixed a bug where showing the summary of flow steps would break with sub-steps in `MetaDeploy`.
- Fixed a bug in the caching of preflight task results in `MetaDeploy`.

### 16.1.70 2.5.6 (2019-08-15)

New features:

- We've changed how the output of some commands are displayed in tables. For users that prefer simpler style tables we've added a `--plain` option to approximate the previous behavior. To permanently set this option, add this in `~/.cumulusci/cumulusci.yml`:

```
cli:
  plain_output: True
```

- Added additional info to the `cci version` command, including the Python version, an upgrade check, and a warning on Python 2.
- Improved the summary of flow steps that is shown at the start of running a flow.
- The `github_release_notes` task now has an `include_empty` option to include links to pull requests that have no release notes. This is enabled by default when this task is called as part of the `release_beta` flow.
- Robot Framework:
  - Added locators file to support the Winter '20 release of Salesforce.
  - New `robot_lint` task to check for common problems in Robot Framework test suites.
  - The `Open Test Browser` keyword will now log details about the browser.
  - Added a new keyword to the CumulusCI library, `Get Community Info`. It can be used to get information about a Community by name via the Salesforce API.

Issues closed:

- Added workarounds for some intermittent 401 errors when authenticating to the GitHub API as a GitHub App.
- `cci org info` shouldn't show traceback if the org isn't found (#1023)

### 16.1.71 2.5.5 (2019-07-31)

New features:

- Add the `cci org shell` command, which opens a Python shell pre-populated with a `simple_salesforce` session on the selected org (as `sf`).
- The `cci flow info` command now shows nested subflows.
- Added the `create_community` task allowing for API-based Community creation.
- Added the `generate_dataset_mapping` task to generate a Bulk Data mapping file for a package.
- CumulusCI can now authenticate for GitHub API calls as either a user or an app. The latter is for use when CumulusCI is used as part of a hosted service.
- The `OrgConfig` object now provides access to the Organization SObject data via the `organization_subject` attribute.

Issues closed:

- The `install_regression` flow now upgrades to the latest beta from the most recent final release instead of from the previous final release.
- Made sure that an `errorMessage` returned from a metadata API deploy will be reported.
- The `load_dataset` task will now stop with an exception if any records fail during the load operation.

### 16.1.72 2.5.4 (2019-07-03)

- Updated the default API version for new projects to 46.0
- Fixed a bug in reporting scratch org creation errors encountered while running a flow.
- Fixed the `snapshot_changes` and `list_changes` tasks to avoid breaking when the last revision number of a component is null.

### 16.1.73 2.5.3 (2019-06-24)

Breaking changes:

- Added two new options to the `UpdateDependencies` task:
  - `allow_newer`: If the org already has a newer release, use it. Defaults to `True`.
  - `allow_uninstalls`: Allow uninstalling a beta release or newer final release if needed in order to install the requested version. Defaults to `False`.

These defaults are a change from prior behavior since uninstalling packages is not commonly needed when working with scratch orgs, and it is potentially destructive.

New features:

- Added support for defining and evaluating preflight checks for `MetaDeploy` plans.
- The tasks for bulk data extract and load are now configured by default as `extract_data` and `load_data`.
- Updated the project template created by `cci project init`:
  - Added `.gitignore`, `README.md`, and a template for GitHub pull requests
  - Added an option to store metadata in DX source format
  - Added a sample `mapping.yml` for the bulk data tasks
  - Specify the currently installed CumulusCI version as the project's `minimum_cumulusci_version`
  - Check to make sure the project name only contains supported characters
- The `robot_libdoc` task can now generate documentation for Robot Framework page objects.

Issues fixed:

- Colors in terminal output are now displayed correctly in Windows. (#813)
- `cci` no longer prints tracebacks when a flow or task is not found. Additionally, it will suggest a name if a close enough match can be found. (#960)
- Fixed `UnicodeDecodeError` when reading output from subprocesses if the console encoding is different from Python's preferred file encoding.
- Fixes related to source tracking:
  - Track the max revision retrieved for each component instead of the overall max revision. This way components can be retrieved in stages into different paths.
  - If `snapshot_changes` doesn't find any changes, wait 5 seconds and try again. There can be a delay after a deployment before source tracking is updated.

### 16.1.74 2.5.2 (2019-06-10)

Issues fixed:

- When generating package.xml, translate `___NAMESPACE___` tokens in filenames into `%%NAMESPACE%%` tokens in package.xml (#1104).
- Avoid extraneous output when `--json` output was requested (#1103).
- Display OS notification when a task or flow completes even if it failed.
- Robot Framework: Added logic to retry the initial page load if it is not loading successfully.
- Internal API change: Errors while processing a response from the Metadata API are now raised as `MetadataParseError`.

### 16.1.75 2.5.1 (2019-05-31)

Issues fixed:

- Fixed `cci service connect` when run outside of a directory containing a CumulusCI project.

### 16.1.76 2.5.0 (2019-05-25)

Breaking changes:

- We reorganized the flows for setting up a package for regression testing for better symmetry with other flows. If you were running the `install_regression` flow before, you now probably want `regression_org`.  
Details: The `install_regression` flow now installs the package `_without_` configuring it. There is a new `config_regression` flow to configure the package (it defaults to calling `config_managed`) and a `regression_org` flow that includes both `install_regression` and `config_regression`.

New features:

- CumulusCI now has experimental support for deploying projects in `DX source format`. To enable this, set `source_format: sfdx` in the project section of `cumulusci.yml`. CumulusCI will deploy DX-format projects to scratch orgs using `sfdx force:source:push` and to other orgs using the Metadata API (by converting to metadata source format in a temporary directory).
- Setting a default org in CumulusCI (using `cci org default` or the `--default` flag when creating a scratch org) will now also update the `sfdx defaultusername`. (#868)
- When connecting to GitHub using `cci service connect github`, CumulusCI will now check to make sure the credentials are valid before saving them.
- Robot Framework:
  - Added a framework for creating “page object” classes to contain keywords related to a particular page or component.
  - The `robot` task now takes a `name` option to control the name of the robot suite in output.
  - Updates to the keyword `Open Test Browser`:
    - \* It allows you to open more than one browser in a single test case. (#1068)
    - \* It sets the default size for the browser window to 1280x1024.
    - \* Added a new keyword argument `size` to override the default size.
    - \* Added a new keyword argument `alias` to let you assign an alias to multiple browser windows.

Issues fixed:

- Robot Framework: Fixed a bug where the `Delete Session Records` keyword would skip deleting some records. (#973)
- If Salesforce returns an error response while refreshing an OAuth token, CumulusCI will now show the response instead of just the HTTP status code.
- Fixed a bug in reporting errors from the Metadata API if the response contains `componentFailures` with no `problem` or `problemType`.

### 16.1.77 2.4.4 (2019-05-09)

New features:

- Added tasks `list_changes` and `retrieve_changes` which interact with source tracking in scratch orgs to handle retrieving changed metadata as Metadata API format source.
- Added task `EnsureRecordTypes` to generate a Record Type and optional Business Process for a specific sObject and deploy the metadata, if the object does not already have Record Types.
- The `update_admin_profile` task now uses Python string formatting on the `package.xml` file used for retrieve. This allows injection of namespace prefixes using `{managed}` and `{namespaced_org}`.

Issues fixed:

- If CumulusCI gets a connection error while trying to call the Salesforce Metadata API, it will now retry several times before giving up.
- The GitHub release notes parser now recognizes Issues Closed if they are linked in Markdown format.
- Robot Framework: Fixed a locator used by the `Select App Launcher App` keyword to work in Summer '19.
- The `cci project init` command now uses an updated repository URL when extending EDA.

### 16.1.78 2.4.3 (2019-04-26)

- Allow configuration of the email address assigned to scratch org users, with the order of priority being (1) any `adminEmail` key in the scratch org definition; (2) the `email_address` property on the scratch org configuration in `cumulusci.yml`; (3) the `user.email` configuration property in Git.
- CumulusCI can now handle building static resource bundles (`*.resource`) while deploying using the Metadata API. To use this option, specify the `static_resource_path` option for the deploy task. Any subdirectory in this path will be turned into a resource file and added to the package during deployment. There must be a corresponding `*.resource-meta.xml` file for each static resource bundle.
- Bulk data tasks: Fixed a bug that added extra underscores to field names when processing lookups.
- Robot Framework: The Salesforce library now has the ability to switch between different sets of locators based on the Salesforce version, and thanks to it we've fixed the robot so it can click on modal buttons in the Summer '19 release.
- The `cci project init` command now generates projects with a different preferred structure for Robot Framework tests and resources, with everything inside the `robot` directory. Existing projects with tests in the `tests` directory should continue to work.

### 16.1.79 2.4.2 (2019-04-22)

- The `purgeOnDelete` flag for the `deploy` task will now automatically be set to `false` when deploying metadata to production orgs (previously deployment would fail on production orgs if this flag was `true`).
- The installation documentation now recommends using `pipx` to install CumulusCI on Windows, so that you don't have to set up a `virtualenv` manually.

### 16.1.80 2.4.1 (2019-04-09)

Changes:

- Updated the default Salesforce Metadata API version to 45.0
- The scratch org definition files generated by `cci project init` now use `orgPreferenceSettings` instead of the deprecated `orgPreferences`.
- The `metadeploy_publish` task now defaults to describing tasks based on `Deploy` as “metadata” steps instead of “other”.

Issues Fixed:

- Fixed a couple problems with generating passwords for new scratch orgs:
  - A project's predefined scratch org configs now default to `set_password: True` (which was already the case for orgs created explicitly using `cci org scratch`).
  - A scratch org config's `set_password` flag is now retained when recreating an expired org. (Fixes #670)
- Fixed the logic for finding the most recent GitHub release so that it now only considers tags that start with the project's `git_prefix_release`.
- Fixed the `install_prod_no_config` flow. The `deploy_post` task was not injecting namespace tokens correctly.
- Fixed the `connected_app` task to work with version 7 of the `sfdx` CLI. (Fixes #1013)
- Robot Framework: Fixed the `Populate Field` keyword to work around intermittent problems clearing existing field values.

### 16.1.81 2.4.0 (2019-03-18)

Critical changes:

- If you are publishing installation plans to MetaDeploy, there have been some significant changes:
  - Plan options are now read from a new `plans` section of `cumulusci.yml` instead of from task options. This means that a single run of the task can now handle publishing multiple plans, and there is now a generic `metadeploy_publish` task which can be used instead of setting up different tasks for each project.
  - Plan steps are now defined inline in the plan configuration rather than by naming a flow. This makes it easier to configure a plan that is like an existing flow with one or two adjustments.
  - There is now a way to customize MetaDeploy step settings such as `name` and `is_required` on a step-by-step basis, using `ui_options` in the plan config.
  - The task will now find or create a `PlanTemplate` as necessary, matching existing `PlanTemplates` on the product and plan name. This means the plan config no longer needs to reference a plan template by id, which makes it easier to publish to multiple instances of MetaDeploy.



- The `install_upgrade` flow was renamed to `install_regression` to better reflect the use case it is focused on. There are also a few updates to what it does:
  - It will now install the latest beta release of managed packages instead of the latest final release.
  - It now runs the `config_managed` flow after upgrading the managed package, so that it will work if this flow has references to newly added components.

Changes:

- Added support for deploying Lightning Web Components.
- Fixed the bulk data load task to handle null values in a datetime column.
- The `ci_master` flow now explicitly avoids trying to install beta releases of dependencies (since it's meant for use with non-scratch orgs and we block installing betas there since they can't be upgraded).

### 16.1.82 2.3.4 (2019-03-06)

- Added a new flow, `install_upgrade`, which can be used for testing package upgrades. It installs and configures the `_previous_` release of the package, then installs the latest release.
- Fixed an error when using `cci org info --json` (fixes #1013).

### 16.1.83 2.3.3 (2019-02-28)

- Fixed a bug where flow options specified on the command line were not passed to tasks correctly.
- `cci service connect` now shows a more helpful error message if you call it with a service name that CumulusCI doesn't know about. Fixes #752.
- Deleted scratch orgs will no longer show the number of days since they were created in `cci org list`. Thanks to @21aslade for the fix.
- Updates to the MetaDeploy publish task:
  - It is now possible to publish a new plan for an existing version.
  - It is now possible to specify the AllowedList to which a plan is visible.
- Updates to Robot Framework support:
  - Fixed a bug in the `robot` task: it now accepts an option called `test` rather than `tests`, since the latter was ignored by Robot Framework.
  - Fixed some stability problems with the `Populate Field` keyword.
  - The `robot_libdoc` task has been replaced with a new task of the same name that can generate a single HTML document for multiple keyword files by passing a comma-separated list of files to the `path` option.

### 16.1.84 2.3.2 (2019-02-19)

- Mapping enhancements for bulk QueryData and LoadData tasks
  - The mapping yaml file no longer requires using `Id: sf_id` as a field mapping. If not provided, QueryData and LoadData will use local database ids instead of Salesforce OIDs for storing lookup relationships. Previous mappings which specify the `Id: sf_id` mapping will continue to work as before using the Salesforce OID as the mapping value.
  - The mapping yaml file's `lookups:` section now handles defaults to allow simpler lookup mappings. The only key required is now `table`. If the `key_field` is provided it will be used.
- The `sql_path` option on QueryData can be used to provide the file path where a SQL script should be written. If this option is used, a sqlite in-memory database is used and discarded. This is useful for storing data sets in a Github repository and allowing diffs of the dataset to be visible when reviewing Pull Requests
  - When using this option, it is best to make sure your mapping yaml file does not provide a field mapping for the `Id` field. This will help avoid merge conflicts if querying data from different orgs such as scratch orgs.
- The `sql_path` option on LoadData can be used to provide the file path where a SQL script file should be read and used to load an in-memory sqlite database for the load operation.

### 16.1.85 2.3.1 (2019-02-15)

- Fixed a bug that caused the `cci` command to check for a newer version on every run, rather than occasionally. Also we now detect whether CumulusCI was installed using Homebrew and recommend an upgrade command accordingly.
- CumulusCI now automatically generates its own keychain key and stores it in the system keychain (using the Python *keyring* library). This means that it is no longer necessary to specify a `CUMULUSCI_KEY` as an environment variable. (However, the environment variable will still be preferred if it is there, and it will be migrated to the system keychain.)
- New task `connected_app` makes it easier to deploy and configure the Connected App needed for CumulusCI's keychain to work with persistent orgs. The connected app is deployed using `sfdx` to an org in the `sfdx` keychain and defaults to the `defaultdevhubusername`.
- The `robot` task gives a more helpful error message if you forget to specify an org.
- Updates to the task for publishing to MetaDeploy:
  - Dependency installation steps are now named using the package name and version.
  - The task options have been revised to match changes in the MetaDeploy API. An optional `plan_template_id` is now accepted. `preflight_message` is now named `preflight_message_additional` and is optional. `post_install_message` is now named `post_install_message_additional` and is optional.

### 16.1.86 2.3.0 (2019-02-04)

#### Changes:

- When installing a managed package dependency, pre & post metadata bundles are now fetched from the git commit corresponding to the most recent release of the managed package, instead of master.
- Improvements to the task for publishing a release to MetaDeploy: \* It can now publish a tag even if it's a different commit than what is currently checked out in the working directory. \* It now pins managed deployments of metadata bundles to the git commit corresponding to the most recent release of the managed package.

#### Issues Closed:

- #962: `cumulusci.utils.findReplace` uses wrong file encoding in Python 3
- #967: Allow `cci service` commands to be run from outside a project repository

### 16.1.87 2.3.0b1 (2019-01-28)

#### Breaking Changes:

- We refactored the code for running flows. The full list of steps to run is now calculated from nested flow configuration when the flow is initialized instead of during runtime. Your existing flows should continue to run as before, but if you're interacting with CumulusCI at the Python API level, you'll need to use the `FlowCoordinator` instead of `BaseFlow`.
- Tasks are now expected to have no side effects when they are instantiated. If tasks need to set up resources, do that in `_init_task` instead of `__init__` or `_init_options` to make sure it doesn't happen until the task is actually being run.

#### Changes:

- There is now a `dev_org_beta_deps` flow which sets up an org in the same way as `dev_org`, but installs the latest beta versions of managed package dependencies.
- The `github_release` task now records the release dependencies as JSON in the release's tag message.
- Looking up the latest release from GitHub is now done using a single HTTP request rather than listing all releases.
- We added S-Controls to the list of metadata types that the `uninstall_packaged_incremental` task will delete.
- Salesforce Robot Framework library: The `Get Current Record Id` keyword now parses the Id correctly when prefixed with `%2F`, which apparently happens.
- The `push_failure_report` task now avoids an error when querying for info about lots of subscriber orgs.

#### Issues Closed:

- #911: Fix `UnicodeDecodeError` when parsing XML retrieved from the Metadata API.

### 16.1.88 2.2.6 (2019-01-03)

#### Changes:

- Added support for more metadata types: `Group`, `SharingSet`, `SharingCriteriaRule`, `SharingOwnerRule`, and `SharingTerritoryRule`.
- Release process: We now have tools in place to release `cumulusci` so that it can be installed using Homebrew or Linuxbrew.

#### Issues Closed:

- Fixed an issue where tasks using the Salesforce REST API could build a wrong URL with an extra slash after the instance URL.
- Fixed an issue where overriding a flow step to set flow: None did not work.
- Robot Framework: Added an automatic retry to work around an issue with an intermittent ConnectionResetError when connecting to headless Chrome in Python 3.

### 16.1.89 2.2.5 (2018-12-26)

- The `install_managed` and `install_managed_beta` tasks now take optional `activateRSS` and `password` options. `activateRSS` is set to true by default so that any active Remote Site Settings in the package will remain active when installed.
- When running a task with the `--debug` flag, HTTP requests are now logged.
- Robot Framework:
  - Fix issue where “Get Current Record Id” could accidentally match the object name instead of the record Id.
  - Fix issue where “Load Related List” would fail to scroll down to the list.
  - Fix issue where errors deleting records during test teardown would cause a hidden test failure.

### 16.1.90 2.2.4 (2018-12-17)

Changes:

- Bulk query task:
  - Fixed an issue with querying data filtered by record type (#904).
  - Fixed an issue where the optimized approach for loading data into PostgreSQL was not used.
  - The task will now prevent you from accidentally overwriting existing data by exiting with an error if the table already exists.
- The `deploy` task now logs the size of the zip payload in bytes.
- Fixed a `TypeError` in the `commit_apex_docs` task (#901).
- Robot Framework:
  - Add location strategies for locating elements by text and by title.

### 16.1.91 2.2.3 (2018-12-07)

Changes:

- Improved error messages when scratch org creation failed and when a service is not configured.
- Robot Framework: Limit how long the “Load Related List” keyword will wait.

### 16.1.92 2.2.2 (2018-11-27)

Changes:

- Improved error handling during scratch org creation:
  - Capture and display stderr output from SFDX (issue #413).
  - Avoid infinite recursion if username wasn't found in output from SFDX.
- Robot Framework: Increased the timeout for initial loading of the browser.

### 16.1.93 2.2.1 (2018-11-21)

Oops, an update in CumulusCI 2.2.0 ended up breaking the `update_dependencies` task! Now fixed.

### 16.1.94 2.2.0 (2018-11-21)

Changes:

- Tasks can now be placed in groups for the task list! Just specify a `group` when defining the task in YAML.
- By popular request, there is now an `org import` command to import an org from the SFDX keychain to the CumulusCI keychain. It takes two arguments: the SFDX username or alias, and the org name.
- Robot Framework:
  - The `Populate Field` keyword now clears an existing value using keystrokes to make sure that change events are fired.
  - Added a `Get Namespace Prefix` keyword to the CumulusCI library to get the namespace prefix for a package.
  - Fixed a bug that broke opening a browser after using the `Run Task` keyword.
- Documentation updates:
  - The readme now includes a link to the full documentation.
  - The instructions for installing CumulusCI on macOS have been simplified and now recommend using the official Python installer from python.org instead of Homebrew. (Homebrew should still work fine, but is no longer necessary.) We also now suggest creating a virtualenv using `venv` rather than `pyenv` since the former is included with Python. It's fine to continue using `pyenv` if you want.
  - Give more useful links for how to set up SFDX.
  - Updated robot library docs.
- Internal refactoring:
  - Removed dependency on `HiYaPyCo` for YAML loading, which would not report which file failed to load in the event of a YAML parse error.
  - We now consistently load YAML in the same manner throughout the entire library, which will work with all supported Python versions.
  - Simplified the Python API for setting up a CumulusCI runtime. Begone, `YamlGlobalConfig` and `YamlProjectConfig`. Our Python API is not yet documented, but we're working on it. In the meantime, if you were relying on running CCI from within Python, you can now just use `BaseGlobalConfig` (and its `get_project_config` member) to bootstrap CCI.
  - `BaseProjectConfig` has shrugged off some methods that just delegated to the keychain.

- BaseGlobalConfig has shrugged off some unimplemented methods, and BaseGlobalConfig.get\_project\_config is now deprecated in favor of using a runtime.
- Introducing... CumulusCIRuntime! In order to alleviate the complexities of getting CumulusCI tasks/flows running from within a Python application, CumulusCIRuntime encapsulates a lot of the details and wiring between Keychain, GlobalConfig, and ProjectConfig. Usage docs are barely included.
- CliConfig has been renamed to CliRuntime and now inherits from CumulusCIRuntime. It is still accessible as CliConfig.
- Upgraded dependencies.
- Contributor improvement: The contributor docs now explain how to install pre-commit hooks to make sure our linters have run before you commit.

Issues Closed:

- #674: cci org import <username> <org\_name>
- #877: CumulusCI should be able to connect to any DX alias and/or understand dx auth files

### 16.1.95 2.1.2 (2018-10-29)

Oops, we broke a few things! This is a bugfix release to fix a few issues found during the Salesforce.org Open Source Community Sprint last week.

Issues Closed:

- #858 Dataload bulk query fails to load data into the sqlite db
- #862 CLI options fail on robot task in 2.1.1
- #864 Deploying a -meta.xml file with non-ASCII characters breaks in Python 2

### 16.1.96 2.1.1 (2018-10-23)

Changes:

- Our robotframework library for Salesforce got a number of improvements:
  - New keywords:
    - \* Click Header Field Link: Clicks a link in a record header
    - \* Load Related List: Scrolls to a related list and waits for it to load
    - \* Click Related List Button: Clicks a button in the header of a related list
    - \* Click Related Item Link: Clicks the main link for an item in a related list
    - \* Click Related Item Popup Link: Clicks a link in the popup menu for an item in a related list
  - Updated to robotframework-seleniumlibrary 3.2.0 which includes a Scroll Element Into View keyword.
  - Wait Until Loading Is Complete now waits for the main body of the page to render
  - Populate Lookup Field now tries several times in case there's an indexing delay
  - Added a -o verbose True option to the robot task which logs each keyword as it runs.
  - We now ignore errors while running the script that waits for XHRs to complete (it can fail if the page reloads before the script finishes).

- Popup notifications upon completion of a flow or task now work on Linux too, if you have the `notify-send` command from `libnotify`. On Ubuntu, install the `notify-osd` package.

Issues Closed:

- #827 Bulk data load breaks in Python 2
- #832 pip install cumulusci gets the wrong version of urllib3

### 16.1.97 2.1.1b1 (2018-10-17)

- `uninstall_packaged_incremental` task: Added `ignore` option to specify components to skip trying to delete even if they are present in the org but not in the local source.

### 16.1.98 2.1.0 (2018-10-16)

- Fixed the `cci project init` command, which was failing because it wanted the project to already exist! Fixes #816. In addition, other commands will now function without an active project or keychain when it possible to do so. (For example, try `cci version` which now works when you're not in a project directory.)
- **update\_dependencies task:**
  - Added support for installing private github repositories as dependencies. Thanks to Anthony Backhouse (@lhandclapping) for the patch. Fixes #793
  - Added a `dependencies` option to override the project dependencies.
- **execute\_apex task:**
  - Print more useful error messages when there are Apex exceptions.
- **robot task:**
  - Our logic for automatically retrying failed selenium commands has been encapsulated into the `cumulusci.robotframework.utils.selenium_retry` decorator which can be applied to a robot library class for increased stability.
  - There is now an option to pause and enter the Python debugger after a keyword fails. Run with `-o pdb True`.
  - Revised keywords and locators to support the Winter '19 release of Salesforce and improve stability.
  - The `Salesforce.robot` file now includes the `OperatingSystem` and `XML` libraries from Robot Framework by default. These libraries are helpful in building integration tests such as modifying and deploying a `PageLayout` to include a field needed in Suite Setup of an integration test.
- Revised installation instructions for Windows. Thanks Matthew Blanski (@Auchtor).
- Internal change: Use a thread-local variable instead of a global to track the current running task.

### 16.1.99 2.1.0b1 (2018-10-05)

- It's happening! Hot on the heels of the last release, CumulusCI is making the jump to the modern era by adding **support for Python 3!** (Specifically, Python 3.6 and 3.7.) Don't worry, we'll also continue to support Python 2 for the time being. Because this is a bit more wide-reaching change than normal, we're releasing a beta first. To install the beta you'll need to explicitly request its version: `pip install cumulusci==2.1.0b1`. If you already have CumulusCI, after the update it will continue to run under your Python 2 interpreter. If you want to switch to the Python 3 interpreter (which is not yet required), we recommend deleting your Python virtualenv and starting over with the instructions in the [tutorial](#). If you want to keep your Python 2-based virtualenv around just in case, follow those instructions but name the new virtualenv `cci-py3` instead of `cci`.
- There are also some big changes to the **bulk data** tasks. Did you know CumulusCI has bulk data tasks? They are not configured by default, because we need to finish documenting them. But we'll list the changes in case someone is already relying on them: \* Fixed connection resets by downloading an entire result file before processing. \* Improved performance by processing batches in parallel, avoiding the SQLAlchemy ORM, storing inserted Ids in separate tables, and doing lookups using SQL joins rather than a separate query for each row. \* If you're using a postgres database for local storage, performance gets even better by taking advantage of postgres' COPY command to load CSV directly. \* Added a `hardDelete` option for bulk deletes. \* Added a `start_step` option for bulk loads which can be used to resume loading after an error.
- The `push_failure_report` task will now by default hide failures that occurred due to the "Package Uninstalled" or "Salesforce Subscription Expired" errors, which are generally benign.
- Fixed the check for newer CumulusCI versions to work around an issue with old `setuptools`.
- Contributor change: We switched CumulusCI's own tests to run using `pytest`.
- Internal change: We switched to the `cryptography` library for handling keychain encryption.

### 16.1.100 2.0.13 (2018-10-02)

- Happy Spooky October! It's unlucky release 2.0.13, with some scary-cool improvements. Just to show you how ramped up our RelEng team is now, this release had TWENTY THREE pull requests in 12 days! From all four of your friendly SFDO Release Engineering committers. Thanks so much for continuing to use CCI for all your Salesforce automation needs.
- NEW FLOW: `ci_beta_dependencies` installs the latest beta of project dependencies and run tests. Includes task error when running against non-scratch orgs.
- NEW TASK: `ReportPushFailures` pulls a list of Package Push Upgrade Request failures after a push attempt, including grouping by important factors.
- Issue a terminal "Bell" sound and attempt to display a macOS notification when a commandline task or flow completes.
- Cleaned up python exception and error handling across the board, so that we can provide you, the user, with only the most relevant information. Try using CCI without setting your `CUMULUSCI_KEY` and see a simplified error message.
- Fixed the utils for processing namespaces in package zip files to handle non-ASCII characters
- The `CONTRIBUTING.rst` docs and Makefile have been updated to show how we release updates of CCI.
- Skip beta releases when checking for a newer cumulusci version
- When using the `strip_namespace` option on deployments, we now log which files had changes made before deploying.
- Going Out: the `SFDXDeploy` and `SFDXJsonPollingTasks` have been removed, as they didn't work.



- **Going Out:** Use the `safe_load()` method when loading YAML instead of the naive `load()`. If you relied on executing code in your CCI YAML file parsing, that will no longer work.

#### 16.1.101 2.0.12 (2018-09-20)

- Fixed apexdoc URL
- Fixed `update_admin_profile` to set any existing record type defaults to false before setting new defaults.
- Fixed deployment of `-meta.xml` files containing non-ASCII characters.
- Updated the robot selector for “Click Modal Button” to work for modals opened by a Quick Action.

#### 16.1.102 2.0.11 (2018-09-14)

- `update_admin_profile` now uses xml parsing instead of string replacement for more targeted editing of `Admin.profile` to fix issues with deploying record types via dependencies
- Projects can declare a dependency on a minimum version of cumulusci by specifying `minimum_cumulusci_version` in `cumulusci.yml`

#### 16.1.103 2.0.10 (2018-09-13)

- `update_admin_profile` task now sets application and tab visibility and supports setting record type visibility and default via the new `record_types` task option
- Restructured exceptions to include two new parent exceptions useful in client implementations:
  - `CumulusCIFailure`: Used to signify a failure rather than an error, such as test or metadata deployment failures
  - `CumulusCIUsageError`: Use to signify a usage error such as accessing a task that does not exist
- `execute_anon` task now accepts either `apex` (string) or `path` (Apex in a local file) for the Apex to execute. Also, the `managed` and `namespaced` options allow injecting namespace prefixes into the Apex to be executed.
- New flow `retrieve_scratch` can be used to retrieve declarative changes from a scratch org into the `src/` directory

#### 16.1.104 2.0.9 (2018-09-10)

- Make robot commands use new lightning URLs
- Remove unused `filter_name` arg from Go to Record Home robot keyword.
- Fix metadata map for Settings.

### 16.1.105 2.0.8 (2018-08-21)

- Flows that are executed from within another flow now support task-level control flow.
- We no longer support the undocumented ability for a Flow to provide its own `class_path`.
- Use the connected app details to set a client name on HTTP requests to Salesforce.

### 16.1.106 2.0.7 (2018-08-16)

- `cci service show` has been renamed `cci service info`!
- Update default API version in the base YAML to v43.0.
- Doc updates in the tutorial, thanks to @justindonnaruma!
- Significant refactor of the cli module, including a bunch of small usability and exception handling changes. See <https://github.com/SFDO-Tooling/CumulusCI/pull/708> for details.
- Display the file name for error causing files in more cases.
- Strip packageVersions tags from aura/, components/, and pages/ metadata.
- Update PyYAML dependency.

### 16.1.107 2.0.6 (2018-08-07)

- In Robot tests that use the standard keyword for interacting with a lookup field, we now wait for all AJAX requests to complete before submitting.
- Add unit tests for large sections of the library.
- We now support Flow, DuplicateRule, and other new Metadata types thanks to @carlosvl.
- Fixed refreshing oauth token when deploying metadata to persistent orgs.

### 16.1.108 2.0.5 (2018-08-01)

- Fixes #695: Update InstallPackageZipBuilder to set activateRSS to unblock installs.

### 16.1.109 2.0.4 (2018-07-30)

- Fixes #611: Scratch org operations were failing on Windows
- Fixes #664: Scratch org aliases incorrectly included double quotes in the alias name

### 16.1.110 2.0.3 (2018-07-27)

- Added support for waiting on Aura HTTP Requests to complete after a browser action is performed in selenium from the Robot Salesforce Library: <http://cumulusci.readthedocs.io/en/latest/robotframework.html#waiting-for-lightning-ui>
- Github API client will now automatically retry on 502 errors
- Better error messages from parsing errors during package.xml generation which show the file causing the error

### 16.1.111 2.0.2 (2018-06-06)

- Bugfix: Update InstallPackageZipBuilder to use a recent api version to unblock installs.

### 16.1.112 2.0.1 (2018-06-06)

- Bugfix: Allow passing a connected app directly to OrgConfig.refresh\_oauth\_token.

### 16.1.113 2.0.0 (2018-06-01)

After over 19 months of development as alpha (40 version over 3 months) and beta (98 releases over 16 months) releases and over a year running production builds using CumulusCI, it's time to remove the "beta" label.

This marks the first production release of CumulusCI 2.x!

### 16.1.114 2.0.0-beta99 (2018-05-31)

- Ensure that github credentials are never shown in the log for github dependencies with unmanaged metadata

### 16.1.115 2.0.0-beta98 (2018-05-31)

**WARNING: This release introduces breaking changes to the syntax for flow definitions and to the default flows. If you customized any of the default flows in your project or have defined custom flows, you will need to modify your cumulusci.yml file to work with this release.**

Changes default flows shipped with CumulusCI to a new syntax and structure taking advantage of the ability for flows to call other flows. This allows flows to be modularized in ways that weren't possible when the original set of flows was designed.

- The **tasks:** section in cumulusci.yml for a flow is now renamed to **steps:** A **FlowConfigError** will be raised if an old style flow definition is detected. All existing flow customizations and custom flows need to be changed in the **cumulusci.yml** to avoid raising an exception.
- All default flows have been restructured. Existing customizations of default flows likely need to be changed to adapt to the new structure. In most cases, you will want to move your customizations to some of the new **config\_\*** or **deploy\_\*** instead of the main flows.
- **ci\_beta\_install** has been removed and replaced with **install\_beta** and **uninstall\_managed install\_beta** does not attempt to uninstall an existing version of the package. If you need to uninstall the package first, use the **uninstall\_managed** flow before running **install\_beta**
- Added new **qa\_org** flow to allow different configurations for dev vs QA orgs
- New modularized flows structure allows for easier and more reusable customization:
  - **dependencies** Runs the pre-package deployment dependency tasks **update\_dependencies** and **deploy\_pre** This flow is called by almost all the main flows.
  - **config\_\*** flows provide a place to customize the package configuration for different environments. These flows are called by the main flows after the package metadata is deployed or a managed version is installed. Customizations to the config flows automatically apply to the main flows.
    - \* **config\_apextest** Configure org for running apex tests
    - \* **config\_dev** Configure org for dev use

- \* **config\_managed** Configure org with a managed package version installed
- \* **config\_packaging** Configure the packaging org
- \* **config\_qa** Configure org for QA use
- **deploy\_\*** flows provide a place to customize how metadata deployments are done. The deploy flows do more than just a simple deployment such as unscheduling scheduled jobs, rebuilding the package.xml, and incrementally deleting any stale metadata in the package from the org.
  - \* **deploy\_unmanaged** Used to do a standard deployment of the unmanaged metadata
  - \* **deploy\_packaging** Used to deploy to packaging. Wraps the **create\_managed\_src** task around the deploy to inject metadata that can only be deployed to the packaging org
  - \* **deploy\_unmanaged\_ee** Used to deploy unmanaged metadata to an Enterprise Edition org using the **create\_unmanaged\_ee\_src** task
- **github** dependencies can now point to a private Github repository. All zip downloads from Github will pass the password (should be a personal access token) from the **github** service configured in the CumulusCI keychain.
- **GithubRelease**, **PushUpgradeRequest**, and **PackageUploadRequest** now track the release data as return values

### 16.1.116 2.0.0-beta97 (2018-05-31)

- Salesforce Connected App is now a CCI Service! Instead of using *cci org config\_connected\_app* you can use the familiar *cci service* commands.
- Better error handling when running commands without specifying a default org (thanks @topherlandry)
- Fix issue where scratch org password may become outdated
- Improve Robot test runner task to use the already configured CCI environment instead of trying to create a new one.
- Enable Robot testing in Headless Chrome on Heroku.
- Address Python3 print statement issues.
- Add LogLine task class to log statements and variables.
- Add PassOptionAsResult, PassOptionAsReturnValue to pass options around in Flows.
- Further extended the Flow runner subclass API.

### 16.1.117 2.0.0-beta96 (2018-05-18)

- Fixes for CumulusCI on Windows - CumulusCI 2 now supports Windows environments!
- Support skipping scratch org password creation by specifying *-no-password* to *cci org scratch*
- Add additional logging to PackageUpload

### 16.1.118 2.0.0-beta95 (2018-05-10)

- Add pytz to requirements

### 16.1.119 2.0.0-beta94 (2018-05-10)

- Support added for nested flows. Specify a flow instead of a task inside another flow in cumulusci.yml
- Add new task `github_release_report` to report info from GitHub release notes
- Add new flow `dev_deploy` for minimal deploy (tasks: `unschedule_jobs`, `deploy`)
- Enhance `BaseFlow` to be more easily subclassed/overridden/observed. Preserves task step number and adds several hook methods for subclasses (`_pre_task`, `_post_task`, `_post_task_exception`)
- **Refactor `github_release_notes` task to use `github3.py` instead of calling the GitHub API directly. Includes these minor changes:**
  - Cannot create release with this task (use `github_create_release` instead)
  - Merge existing release notes even when not publishing
- Fix issue that caused duplicate entries in the dependency tree
- Sort output of `os.listdir` in all occurrences. Guarantees ordered iteration over files on disk
- Validate `CUMULUSCI_KEY` value and raise more helpful exceptions if invalid

### 16.1.120 2.0.0-beta93 (2018-04-20)

- Fix issue in command task for Windows
- Support interactive in command task (thanks Chris Landry!)
- Search more pull requests (100 vs 30) when generating release notes
- Add options to Apex documentation generator task

### 16.1.121 2.0.0-beta92 (2018-04-04)

- Ignore OWNERS file in package.xml generation
- Pipe stderr in command tasks

### 16.1.122 2.0.0-beta91 (2018-04-03)

- Fix issue in ZIP functionality for Windows

### 16.1.123 2.0.0-beta90 (2018-03-26)

- Include missing `scratch_def.json` template file needed by `cci project init`

### 16.1.124 2.0.0-beta89 (2018-03-23)

- **Improved `cci project init`**
  - Prompt for extending a repository with HEDA and NPSP as selectable options
  - Use jinja2 templates included with `cumulusci` to create files
  - Include a default Robot test
- `update_package_xml` now ignores CODEOWNERS files used by Github
- Fixed an import error for `click` in `cci`

### 16.1.125 2.0.0-beta88 (2018-03-20)

- Fix issue in parsing version from tag name

### 16.1.126 2.0.0-beta87 (2018-03-15)

- Fix issue in getting latest version

### 16.1.127 2.0.0-beta86 (2018-03-13)

- Initial Integration with Robot Framework (see here for details: <http://cumulusci.readthedocs.io/en/latest/robotframework.html>)
- Add support for `GlobalValueSetTranslation` Metadata Type (thanks Christian Szandor Knapp!)
- Use Tooling API for `PackageUploadRequest`
- New doc “Why CumulusCI?”
- Add documentation for the `skip` option on GitHub dependencies

### 16.1.128 2.0.0-beta85 (2018-02-21)

- Support `bigobject` index element in `.object`
- Only run `meta.xml` file cleaning on `classes/*` and `triggers/*` directory
- Add docs on CumulusCI Flow
- Add reference to needing the Push API to run `release_beta` in tutorial doc

### 16.1.129 2.0.0-beta84 (2018-02-12)

- Add new Status 'Queued' to PackageUploadRequest check

### 16.1.130 2.0.0-beta83 (2018-02-08)

- Add a sleep in between successful PackageUploadRequest and querying for MetadataPackageVersion to address issue in Spring '18 packaging orgs.

### 16.1.131 2.0.0-beta82 (2018-02-02)

- Update salesforce-bulk package to version 2.0.0
- Fix issue in bulk load data task

### 16.1.132 2.0.0-beta81 (2018-01-18)

- Filter SObjects by record type in bulk data retrieve
- Fix issue in removing XML elements from file

### 16.1.133 2.0.0-beta80 (2018-01-08)

- **The deploy tasks now automatically clean all meta.xml files in the deployed metadata of any namespace references by removing the namespace prefix.**
  - The default functionality can be disabled with the by setting *clean\_meta\_xml* to False
- Github dependencies can now point to a specific tag in the repository. The tag is used to determine the version to install for the dependency if the repository has a namespace configured and will be used to determine which unpackaged metadata to deploy.

### 16.1.134 2.0.0-beta79 (2017-11-30)

- Fixes #540: Using a custom *prefix\_beta* fails if releases with the same version but different prefix already exist in the repository. Changed to use *tag\_name* instead of *name* to check if the release already exists in Github.

### 16.1.135 2.0.0-beta78 (2017-11-22)

Resolving a few issues from beta77:

- A bug in BaseKeychain.create\_scratch\_org was causing the creation of ScratchOrgConfig's with a days value of None. This caused issues with subsequent calls against the org.
- Fixed output from new logging in namespace injection
- Switch to using org\_config.date\_created to check if an org has been created
- Fix bug in recreation of an expired scratch org

### 16.1.136 2.0.0-beta77 (2017-11-22)

- New Salesforce DX tasks: *dx\_convert\_from*, *dx\_convert\_to*, *dx\_pull*, and *dx\_push*
- New flow for creating production releases (use with caution!): *release\_production*
- Scratch org configs can now specify *days* as an option which defaults to 1. The default for a scratch config can be overridden in *cci org scratch* with the *–days N* option
- *cci org remove* will now attempt to first delete a scratch org if one was already created
- *cci org scratch* will prevent you from overwriting a scratch config that has already created a scratch org (which would create an orphaned scratch org) and direct you to use *cci org remove* instead.
- *cci org list* now shows the duration days, elapsed days, and if an org is expired.
- *cci org info* now shows the expiration date for scratch orgs
- All *cci* commands that update an org config will now attempt to automatically recreate an expired scratch org
- New namespace inject token strings are supported for injecting namespaces into Lightning Component references:
  - *%%NAMESPACE\_OR\_C%%*: Replaced with either ‘your\_namespace’ (unmanaged = False) or ‘c’ (unmanaged = True)
  - *%%NAMESPACEED\_ORG\_OR\_C%%*: Replaced with either ‘your\_namespace’ (namespaced\_org = True) or ‘c’ (namespaced\_org = False)
- Deleted all tasks and code related to *apextestsdb* since its functionality is now integrated into MetaCI and no longer used

### 16.1.137 2.0.0-beta76 (2017-11-14)

- Fix bug in namespace injection
- Add option to print org info as JSON

### 16.1.138 2.0.0-beta75 (2017-11-07)

- Fix syntax for github dependency with *–extend* option on *cci project init*

### 16.1.139 2.0.0-beta74 (2017-11-07)

- Default to Salesforce API version 41.0

### 16.1.140 2.0.0-beta73 (2017-11-07)

- Fix bug in creating the *dev\_namespaced* scratch org config from *cci project init*



### 16.1.141 2.0.0-beta72 (2017-11-06)

- Fix bug in setting namespace from *cci project init*

### 16.1.142 2.0.0-beta71 (2017-11-06)

- Update docs, including tutorial for Windows (thanks Dave Boyce!)
- Add missing “purge on delete” option for BaseUninstallMetadata
- Fix crash when decoding certain strings from the Metadata API response
- Add support for featureParameter\* metadata types (thanks Christian Szandor Knapp!)

### 16.1.143 2.0.0-beta70 (2017-10-30)

- Fix issue in zip file processing that was introduced in v2.0.0b69

### 16.1.144 2.0.0-beta69 (2017-10-27)

- cumulusci.core has been made compatible with Python 3!
- *cci project init* has been upgraded
  - Better prompt driven user experience with explanations of each prompt
  - *--extend <repo\_url>* option to set up a recursive dependency on another CumulusCI project’s Github repository
  - Creates *sfdx-project.json* if it doesn’t already exist
  - Creates and populates the *orgs/* directory if it does not already exist. The directory is populated with starter scratch org shape files for the 4 main scratch org configs in CumulusCI: *beta.json*, *dev.json*, *feature.json*, *release.json*
- Fix issue with namespace injection
- *push\_\** tasks now accept *now* for the *start\_time* option which will start the push upgrade now (technically 5 seconds from now but that’s better than 5 minutes).

### 16.1.145 2.0.0-beta68 (2017-10-20)

- Configure *namespace\_inject* for *deploy\_post\_managed*

### 16.1.146 2.0.0-beta67 (2017-10-20)

- Fix bug where auto-created scratch orgs weren’t getting the *scratch* attribute set properly on their *ScratchOrgConfig* instance.

### 16.1.147 2.0.0-beta66 (2017-10-20)

- Configure *namespace\_inject* for *deploy\_post*
- Fix the *-debug* flag on *cci task run* and *cci flow run* to allow debugging of exceptions which are caught by the CLI such as *MetadataApiError*, *MetadataComponentError*, etc.

### 16.1.148 2.0.0-beta65 (2017-10-18)

#### Breaking Changes

- If you created custom tasks off of *DeployNamespaced* or *DeployNamespacedBundles*, you will need to switch to using *Deploy* and *DeployBundles*. The recommended configuration for such custom tasks is represented below. In flows that need to inject the actual namespace prefix, override the *unmanaged* option ..

```
custom_deploy_task:
  class_path: cumulusci.tasks.salesforce.Deploy
  options:
    path: your/custom/metadata
    namespace_inject: $project_config.project__package__namespace
    unmanaged: False
```

#### Enhancements

- The *cci* CLI will now check for new versions and print output at the top of the log if a new version is available
- The *cci* keychain now automatically creates orgs for all named scratch org configs in the project. The orgs are created with the same name as the config. Out of the box, CumulusCI comes with 4 org configs: *dev*, *feature*, *beta*, and *release*. You can add additional org configs per project using the *orgs -> scratch* section of the project's *cumulusci.yml*. With this change, *cci org list* will always show at least 4 orgs for any project. If an org already exists in the keychain, it is not touched and no scratch org config is auto-created for that config. The goal is to eliminate the need to call *cci org scratch* in most cases and make it easier for new users to get up and running with scratch orgs and CumulusCI.
- *cci org remove <org\_name>* is now available to remove orgs from the keychain
- Scratch orgs created by CumulusCI are now aliased using the naming format *ProjectName\_\_org\_name* so you can easily run *sfdx* commands against scratch orgs created by CumulusCI
- *cci org list* now shows more information including *scratch*, *config\_name*, and *username*. NOTE: *config\_name* will only be populated for newly created scratch configs. You can use *cci org scratch* to recreate the config in the keychain.
- The new flow *dev\_org\_namespaced* provides a base flow for deploying unmanaged metadata into a namespaced org such as a namespaced scratch org
- All tasks which previously supported *namespace\_inject* now support a new option, *namespaced\_org*. This option is designed to handle use cases of namespaced orgs such as a namespaced scratch org. In namespaced orgs, all unmanaged metadata gets the namespace prefix even if it is not included in the package. You can now use the *namespaced\_org* option along with the file content token *%%%NAMESPACED\_ORG%%%* and the file name token *\_\_NAMESPACED\_ORG\_\_* to inject the namespace when deploying to a namespaced org. *namespaced\_org* defaults to *False* to be backwards compatible with previous functionality.
- New task *push\_list* supports easily pushing a list of OrgIds via the Push API from the CLI: *cci task run push\_list -o file <file\_path> -o version 1.2 -org packaging*

### 16.1.149 2.0.0-beta64 (2017-09-29)

- Show proper exit status for failed tests in `heroku_ci.sh`
- Handle `BrowserTestFailure` in CLI
- Fix issue that prevented auto-merging master to parent branch

### 16.1.150 2.0.0-beta63 (2017-09-26)

- Documentation has been updated!
- CumulusCI now supports auto detection of repository information from CI environments. This release includes an implementation for Heroku CI

### 16.1.151 2.0.0-beta62 (2017-09-19)

- `cci` now supports both namespaced and non-namespaced scratch org configurations in the same project. The default behavior changes slightly with this release. Before, if the `sfdx-project.json` had a namespace configured, all scratch orgs created via `cci org scratch` would get the namespace. With the new functionality, all orgs would by default not have the namespace. You can configure individual org configs in your project's `cumulusci.yml` file by setting `namespace: True` under `orgs -> scratch -> <org_name>`

### 16.1.152 2.0.0-beta61 (2017-09-12)

- Fix bug that was causing a forced token refresh with `sfdx force:org:open` at the start of a flow or task run against a freshly created scratch org.
- Add support for Big Objects with `__b` suffix in `update_package_xml` and `update_package_xml_managed`
- Fix bug that caused release notes sections to not render if only h2 content found

### 16.1.153 2.0.0-beta60 (2017-09-06)

- Add support for Platform Events with `__e` suffix in `update_package_xml` and `update_package_xml_managed`

### 16.1.154 2.0.0-beta59 (2017-09-06)

- `YamlProjectConfig` can now accept an `additional_yaml` keyword argument on initialization. This allows a 5th level of layering to the `cumulusci.yml` config. This change is not wired up to the CLI yet but is available for application built on top of `cumulusci` to use.
- `cumulusci.core.flow` and `cumulusci.core.keychain` now have 100% test coverage

### 16.1.155 2.0.0-beta58 (2017-08-29)

- Fix import error in *github\_release\_notes* task introduced in beta57

### 16.1.156 2.0.0-beta57 (2017-08-28)

- Task options can now dynamically reference attributes from the `project_config` using the syntax `$project_config.attr_name`. For example, `$project_config.repo_branch` will resolve to the current branch when the task options are initialized.
- New task *github\_parent\_to\_children* uses new functionality in *MergeBranch* to support merging from a parent feature branch (ex. *feature/parent*) into all child branches (ex. *feature/parent\_\_child*).
- *github\_master\_to\_feature* task will now skip child branches if their corresponding parent branch exists
- *ci\_feature* flow now runs *github\_parent\_to\_children* at the end of the flow
- Github task classes were restructured but the *class\_path* used in *cumulusci.yml* remains the same
- New test coverage for github tasks

### 16.1.157 2.0.0-beta56 (2017-08-07)

- Add stderr logging to scratch org info command

### 16.1.158 2.0.0-beta55 (2017-08-07)

- Fix API version issue in Apex test runner

### 16.1.159 2.0.0-beta54 (2017-08-04)

- Fix issue in parsing test failure details when org has objects that need to be recompiled.

### 16.1.160 2.0.0-beta53 (2017-08-04)

- Fix “cci org config\_connected\_app” for Windows
- Update tutorial for Windows usage
- Reverse pull request order for release notes

### 16.1.161 2.0.0-beta52 (2017-08-02)

- Release notes parsers now specified in *cumulusci.yml*

### 16.1.162 2.0.0-beta51 (2017-08-01)

- New task to commit ApexDoc output
- New test runner uses Tooling API to get limits data

### 16.1.163 2.0.0-beta50 (2017-07-18)

- Fix handling of boolean command line args

### 16.1.164 2.0.0-beta49 (2017-07-10)

- New task *batch\_apex\_wait* allows pausing until an Apex batch job completes. More details at <https://github.com/SFDO-Tooling/CumulusCI/pull/372>
- SalesforceBrowserTest task now accepts *extra* argument for specifying extra command line arguments separate from the command itself
- Resolved #369: Scratch org tokens expiring after upgrade to SFDX beta

### 16.1.165 2.0.0-beta48 (2017-06-28)

- Upgraded to the Salesforce DX Beta (thanks to @Szandor72 for the contribution!)
  - NOTE: CumulusCI will no longer work with the sfdx pilot release after this version!
  - Replaced call to *force:org:describe* with *force:org:display*
  - Changed json response parsing to match beta format
- New SFDX wrapper tasks
  - *SFDXBaseTask*: Use for tasks that don't need org access
  - *SFDXOrgTask*: Use for sfdx tasks that need org access. The task will refresh the cci keychain org's token and pass it to sfdx as the target org for the command
  - *SFDXJsonTask*: Use for building tasks that interact with sfdx via json responses
  - *SFDXJsonPollingTask*: Use for building tasks that wrap sfdx json responses including polling for task completion
  - *SFDXDeploy*: An example of using *SFDXJsonPollingTask* to wrap *force:mdapi:deploy*
- Fixed infinite loop if setting scratch org password fails

### 16.1.166 2.0.0-beta47 (2017-06-26)

- Fix typo in tasks.util

### 16.1.167 2.0.0-beta46 (2017-06-23)

- Fix bug in implementation of the `--no-prompt` flag when sentry is configured

### 16.1.168 2.0.0-beta45 (2017-06-23)

- The new *BaseSalesforceApiTask* class replaces *BaseSalesforceApiTask*, *BaseSalesforceBulkApiTask*, and *BaseSalesforceToolingApiTask* by combining them into a single task class with access to all 3 API's via *self.sf*, *self.tooling*, and *self.bulk* from inside a task instance.
- Added integration with sentry.io
  - Use *cci service connect sentry* to enable the sentry service
  - All task execution exceptions will be logged as error events in sentry
  - *cci task run* and *cci flow run* will now show you the url to the sentry event if one was registered and prompt to open in a browser.
  - *cci task run* and *cci flow run* now accept the `--no-prompt` option flag for running in non-interactive mode with the sentry service configured. Use this if you want to log build errors in sentry but not have builds fail due to a hanging prompt.
- If a scratch org password has expired, it is now regenerated when calling *cci org info*
- New task *unschedule\_apex* was added to unschedule background jobs and added to the start of the *dev\_org* flow
- *update\_meta\_xml* task now uses the project's dependencies as the namespace/version to update in the meta.xml files
- The bulkdata mapping now properly supports Record Types
- Fixed a bug with BulkDataQuery where local references weren't getting properly set
- New CumulusCI Branch & Release Overview diagram presentation is available at [http://developer.salesforce.org/CumulusCI/diagram/process\\_overview.html](http://developer.salesforce.org/CumulusCI/diagram/process_overview.html) Use left/right arrow buttons on your keyboard to navigate through the presentation.
- CumulusCI is now being built by Heroku CI using the config in *app.json*

### 16.1.169 2.0.0-beta44 (2017-06-09)

- Fix issue in *update\_dependencies* when a github dependency depends on another github dependency

### 16.1.170 2.0.0-beta43 (2017-06-09)

- Fix issue in *mrbelvedere\_publish* where the new *zip\_url* dependencies weren't being skipped

### 16.1.171 2.0.0-beta42 (2017-06-09)

- Move github dependency resolution logic into `project_config.get_static_dependencies()` for reuse in tasks other than `UpdateDependencies`
- Fixed the `mrbelvedere_publish` task when using github references
- Improved output from parsing github dependencies
- Fix issue in *BulkDataQuery* character encoding when value contains utf8 special characters

### 16.1.172 2.0.0-beta41 (2017-06-07)

- The *dependencies* section in `cumulusci.yml` now supports the *skip* option for Github dependencies which can be used to skip specific subfolders under *unpackaged/* in the target repository
- New task class *BulkDataQuery* reverses the *BulkDataLoad* and uses the mapping to build SOQL queries to capture the data in the mapping from the target org. The data is written to a database that can then be used by *BulkDataLoad* to load into a different org.
- The *Delete* util task now uses the *glob* library so it can support paths with wildcards like `src/*`
- New tasks *meta\_xml\_api* and *meta\_xml\_dependencies* handle updating *\*-meta.xml* files with api versions or underlying package versions.

### 16.1.173 2.0.0-beta40 (2017-06-03)

- More enhancements to *update\_dependencies* including the ability to handle namespace injection, namespace stripping, and unmanaged versions of managed repositories. See the new doc at <http://cumulusci.readthedocs.io/en/latest/dependencies.html>

### 16.1.174 2.0.0-beta39 (2017-06-02)

- Fix new bug in *update\_dependencies* which caused failure when running against an org that already has a required package installed

### 16.1.175 2.0.0-beta38 (2017-06-01)

- *update\_dependencies* now properly handles references to a github repository that itself contains dependencies in its `cumulusci.yml` file
- *update\_dependencies* now handles deploying unmanaged metadata from subfolders under `unpackaged/pre` of a referenced Github repository
- The *dependencies* section of `cumulusci.yml` now supports installing from a zip of metadata hosted at a url if you provide a *zip\_url* and optionally a *subfolder*

### 16.1.176 2.0.0-beta37 (2017-06-01)

- *update\_dependencies* now supports dynamically referencing other Github repositories configured with a *cumulusci.yml* file. The referenced repository's *cumulusci.yml* is parsed and the dependencies are included. Also, the Github API is used to find the latest release of the referenced repo if the *cumulusci.yml* has a namespace configured. Welcome to dynamic package dependency management ;)
- *cci task run* now supports the option flags *-debug-before* and *-debug-after*
- Fix for JUnit output rendering in *run\_tests*

### 16.1.177 2.0.0-beta36 (2017-05-19)

- Flows can now accept arguments in the CLI to override task options
  - *cci flow run install\_beta -o install\_managed\_beta\_\_version "1.0 (Beta 123)"*
- Flows can now accept arguments to in the CLI to skip tasks
  - *cci flow run ci\_feature -skip run\_tests\_debug -skip deploy\_post*
- Anonymous apex failures will now throw an exception and fail the build in *execute\_anon*
- Fixes #322: local variable 'message' referenced before assignment

### 16.1.178 2.0.0-beta35 (2017-05-19)

- New task *execute\_anon* is available to run anonymous apex and takes the extra task option *apex*

### 16.1.179 2.0.0-beta34 (2017-05-16)

- Fixes #317: ERROR: Invalid version specified

### 16.1.180 2.0.0-beta33 (2017-05-11)

- *cci org connect* and *cci org scratch* now accept the *-default* option flag to set the newly connected org as the default org for the repo
- *cci org scratch* now accepts a new option, *-devhub <username>*, which allows you to specify an alternate devhub username to use when creating the scratch org
- The *SalesforceBrowserTest* class now throws a *BrowserTestFailure* if the command returns an exit status of 1
- Scratch org creation no longer throws an exception if it fails to set a random password on the newly created org
- Push API task enhancements:
  - Push org lists (text files with one org ID per line) can now have comments and blank lines. The first word on the line is assumed to be the org ID and anything after that is ignored.
  - Fixes #294
  - Fixes #306
  - Fixes #208



**16.1.181 2.0.0-beta32 (2017-05-04)**

- Scratch orgs now get an auto-generated password which is available via *cci org info*
- Added metadata mapping for StandardValueSets to fix #310
- Throw nicer exceptions when scratch org interaction fails

**16.1.182 2.0.0-beta31 (2017-04-12)**

- Use UTC for all Salesforce API date/time fields
- Fix issue with listing metadata types
- Add generic polling method to BaseTask

**16.1.183 2.0.0-beta30 (2017-04-04)**

- New task list\_metadata\_types
- [push upgrades] Fix push request status Cancelled → Canceled
- [push upgrades] Fix datetime namespace issues
- [pyinstaller] Import project-level modules with run-time hook

**16.1.184 2.0.0-beta29 (2017-04-04)**

- Report push status if start time is less than 1 minute in the future

**16.1.185 2.0.0-beta28 (2017-03-30)**

- Fix bug in Push API batch retry logic introduced in beta25

**16.1.186 2.0.0-beta27 (2017-03-29)**

- Skip org in push if statusCode is UNKNOWN\_EXCEPTION

**16.1.187 2.0.0-beta26 (2017-03-29)**

- Fixes #278: Push upgrade raises exception for DUPLICATE\_VALUE statusCode

### 16.1.188 2.0.0-beta25 (2017-03-28)

- Fixes #277: Push API tasks now correctly handle errors in individual orgs in a batch when scheduling a push job

### 16.1.189 2.0.0-beta24 (2017-03-27)

- Fixes #231: Handle unicode in package.xml generation
- Fixes #239: Replace fix for windows path issues from beta23 with a better implementation
- Fixes #275: Properly pass `purge_on_delete` option value in `uninstall_packaged_incremental`

### 16.1.190 2.0.0-beta23 (2017-03-22)

- Fixes #239: Add local path to import path when looking up classes. This should fix an error that appeared only in Windows

### 16.1.191 2.0.0-beta22 (2017-03-20)

- `github_release_notes` now supports the `link_pr` option to add links to the pull request where each line of content came from
- Fixes #266: `update_dependencies` now supports the `purge_on_delete` option to allow running against production orgs
- Fixes #267: package.xml generation now skips `RecordType` when rendering in delete mode

### 16.1.192 2.0.0-beta21 (2017-03-17)

- Fix parsing of `OrgId` from the access token using the new `sfdx` CLI

### 16.1.193 2.0.0-beta20 (2017-03-17)

- Switch to using the `sfdx` CLI for interacting with scratch orgs. If you use `cci` with scratch orgs, this release will no longer work with the `heroku force:*` commands from the prior Salesforce DX release.
- Upgrades to release notes generator \* Content is now grouped by subheading under each heading \* Better error message is thrown if a lightweight tag is found when an annotated tag is needed

### 16.1.194 2.0.0-beta19 (2017-03-15)

- Fixes #261: `cci org info` should refresh token first

### 16.1.195 2.0.0-beta18 (2017-03-14)

- Skip deleting Scontrols in incremental delete
- Escape package name when generating package.xml

### 16.1.196 2.0.0-beta17 (2017-03-14)

- OrgConfig and subclasses now support self.username to get the username
- Flows no longer have access to task instance attributes for subsequent task options. Instead, custom task classes should set their task return\_values member.
- Improve printing of org info when running tasks from a flow by only printing once at the start of flow. All tasks have an optional self.flow attribute now that contains the flow instance if the task is being run from a flow.
- BaseTask now includes methods for handling retry logic. Implemented in the InstallPackageVersion and RunApexTests
- New task *retrieve\_unpackaged* can be used to retrieve metadata from a package.xml manifest
- Fixes #240 - CumulusCI should now properly handle escaping special characters in xml where appropriate
- Fixes #245 - Show config values in task info
- Fixes #251 - ApiRetrieveUnpackaged \_clean\_package\_xml() can't handle metadata with spaces in names
- Fixes #255 - ApiListMetadata does not list certain metadata types with default folder value

### 16.1.197 2.0.0-beta16 (2017-02-17)

- Allow batch size to be configured for push jobs with the *batch\_size* job

### 16.1.198 2.0.0-beta15 (2017-02-15)

- Bug fix release for bug in *update\_admin\_profile* from the beta 14 release changes to the ApiRetrieveUnpackaged class

### 16.1.199 2.0.0-beta14 (2017-02-15)

- The new *RetrieveReportsAndDashboards* task class that can retrieve all reports and dashboards from a specified list of folders
- Documentation improvements contributed by @tet3
- Include userinfo in the OrgConfig, and print username and org id at the beginning of every task run. Contribution by @cdcarter
- *project\_local\_dir* (e.g., *~/cumulusci/NPSP-Extension-Template/*, home of the encrypted keychain and local override config) now rely on the project name configured in cumulusci.yml instead of the existence of a git remote named origin. Contribution by @cdcarter

### 16.1.200 2.0.0-beta13 (2017-02-09)

- New services registration support added by community contribution from @cdcarter
  - Services and their schemas can now be defined in the `cumulusci.yml` file. See <https://github.com/SFDO-Tooling/CumulusCI/issues/224> for more details until docs are fully updated
  - `cci services list`
  - `cci services show github`
  - `cci services connect github`
- Improved error handling for metadata deployment failures:
  - Metadata deployments now throw more specific errors when appropriate: `MetadataComponentFailure`, `ApexTestFailure`, or `MetadataApiError`
  - Output for each component failure on a deploy now includes more information such as the column number of the error
- `release_beta` now ignores errors in the `github_release_notes` process by default

### 16.1.201 2.0.0-beta12 (2017-02-02)

- Throw better exceptions if there are failures creating or deleting scratch orgs

### 16.1.202 2.0.0-beta11 (2017-02-01)

- Fixes and new functionality for `update_package_xml_managed` task.
  - Added support for project -> package -> name\_managed in the `cumulusci.yml` file to specify a different package name to use when deploying to the packaging org.
  - Fixed bug with `install_class` and `uninstall_class` handling

### 16.1.203 2.0.0-beta10 (2017-01-20)

- Completed removed CumulusCI 1 code from the repository and egg. The egg should be 17MB smaller now.
- Removed `cumulusci.tasks.ant.AntTask`. Please replace any usage with `cumulusci.tasks.command.Command` or `cumulusci.tasks.command.SalesforceCommand`
- Removed the `update_meta_xml` task for now since it was the only task relying on Ant. A new and much better Python based implementation will be coming soon.

### 16.1.204 2.0.0-beta9 (2017-01-20)

- A few upgrades to the Command task:
  - No longer strip left side whitespace from output to preserve indentation
  - New method `_process_output` can be overridden to change how output lines are processed
  - New method `_handle_returncode` can be overridden to change how exit status is handled

### 16.1.205 2.0.0-beta8 (2017-01-19)

- Added new task classes `util.DownloadZip`, `command.SalesforceCommand`, and `command.SalesforceBrowserTestCommand` that can be mapped in individual projects to configure browser tests or other commands run against a Salesforce org. The commands are automatically passed a refreshed `SF_ACCESS_TOKEN` and `SF_INSTANCE_URL` environment variables.
- Added new CLI commands `cci project connect_saucelabs` and `cci project show_saucelabs`
- Added `ci_install_beta` flow that uninstalls the previous managed version then installs the latest beta without running apex tests
- Added new method `cumulusci.utils.download_extract_zip` to download and extract a zip including re-rooting the zip to a subfolder.
- All Salesforce tasks now delete any tempdirs they create to prevent wasting disk space

### 16.1.206 2.0.0-beta7 (2017-01-17)

- `run_tests_debug` now ignores all non-test methods including any method decorated with `@testSetup`

### 16.1.207 2.0.0-beta6 (2017-01-17)

- Return full info when a component failure occurs on a Metadata API deployment. Previously only the problem was shown without context like file name and line number making it difficult to figure out what caused the failure.
- `run_tests_debug` now ignores the `@testSetup` method when parsing debug logs. Previously it would throw an error if tests used `@testSetup`

### 16.1.208 2.0.0-beta5 (2017-01-16)

- Fixes for the `unmanaged_ee` flow to fix a bug where `availableFields` elements were not properly being stripped from `fieldsSets` in `.object` files
- Fixes for `github_master_to_feature` where merge conflicts would throw exception rather than creating a pull request as expected

### 16.1.209 2.0.0-beta4 (2017-01-13)

- Add `update_admin_profile` to all flows that deploy or install to a Salesforce org. Note that this adjusted the task numbers in some flows so you should double check your project specific flow customizations.

### 16.1.210 2.0.0-beta3 (2017-01-13)

- Remove `deploy_post_managed` task from the default `ci_master` flow. Deploying the unpackaged/post content to the packaging org risks the spider accidentally including some of it in the package. Projects that want to run `deploy_post_managed` against the packaging org can extend `ci_master` in their `cumulusci.yml` file to add it.

### 16.1.211 2.0.0-beta2 (2017-01-12)

- Fix a bug in `project_config.get_latest_version()` with tags that don't match either the beta or release prefix.

### 16.1.212 2.0.0-beta1 (2017-01-12)

- Move into the master branch!
- Changed primary CLI command to `cci` and left `cumulusci2` available for legacy support
- Changed all docs to use `cci` command in examples
- Peg push api tasks to api version 38.0 rather than project api version
- Added 2 new flows: `install_beta` and `install_prod` which install the latest managed version of the package with all dependencies but without running tests
- `release_beta` flow now runs `github_master_to_feature` at the end of the flow

### 16.1.213 2.0.0-alpha42 (2017-01-10)

- Metadata API calls now progressively wait longer between each status check to handle calls with long Pending times. Each check also now outputs a line saying how long it will sleep before the next check.

### 16.1.214 2.0.0-alpha41 (2017-01-06)

- Fix bug in `uninstall_packaged_incremental` where the task would error out if no metadata was found to delete

### 16.1.215 2.0.0-alpha40 (2017-01-06)

- `uninstall_packaged_incremental` task now skips the deploy step if now metadata was found to be deleted

### 16.1.216 2.0.0-alpha39 (2017-01-06)

- Two new task classes exist for loading and deleting data via Bulk API. Note that there are no default task mappings for these classes as the mappings should be project specific. Define your own mappings in your project's `cumulusci.yml` file to use them.
  - **`cumulusci.tasks.bulkdata.LoadData`**: Loads relational data from a sqlite database into Salesforce objects using a yaml file for mapping
  - **`cumulusci.tasks.bulkdata.DeleteData`**: Deletes all records from specified objects in order of object list
- Added support for `customPermissions`
- Added new Command task that can be used to call arbitrary commands with configurable environment variables

### 16.1.217 2.0.0-alpha38 (2016-12-28)

- Scratch orgs now cache the org info locally during flow execution to prevent multiple calls out to the Heroku CLI that are unnecessary
- Scratch org calls now properly capture and print both stdout and stderr in the case of an exception in calls to Heroku CLI
- *run\_tests\_debug* now deletes existing TraceFlag objects in addition to DebugLevels
- Fix bug in *push\_all* and *push\_sandbox*
- Push tasks now use timezone for start\_date option

### 16.1.218 2.0.0-alpha37 (2016-12-20)

- *github\_release\_notes* now correctly handles the situation where a merge commit's date can be different than the PR's merged\_at date in Github by comparing commit sha's

### 16.1.219 2.0.0-alpha36 (2016-12-20)

- *github\_release* now works with an existing tag/ref and sleeps for 3 seconds after creating the tag to allow Github time to catch up

### 16.1.220 2.0.0-alpha35 (2016-12-20)

- Remove *draft* option from *github\_release* since the Github API doesn't support querying draft releases

### 16.1.221 2.0.0-alpha34 (2016-12-20)

- Fix bug with *github\_release* that was causing validation errors from Github

### 16.1.222 2.0.0-alpha33 (2016-12-20)

- *github\_release\_notes* now raises an exception in *publish* mode if the release doesn't exist instead of attempting to create it. Use *github\_release* to create the release first before calling *github\_release\_notes*
- Fix a bug with dynamic task option lookup in flows

### 16.1.223 2.0.0-alpha32 (2016-12-19)

- Move logger configuration out of core and into CLI so other implementations can provide their own logger configurations
- Added *retry\_interval* and *retry\_interval\_add* options to *install\_beta* to introduce a progressive delay between retry attempts when the package is unavailable

### 16.1.224 2.0.0-alpha30 (2016-12-13)

- **IMPORTANT** This release changes the yaml structure for flows. The new structure now looks like this:

```
flows:
  flow_name:
    tasks:
      1:
        task: deploy
      2:
        task: run_tests
```

- See the new flow customization examples in the cookbook for examples of why this change was made and how to use it: <http://cumulusci.readthedocs.io/en/latest/cookbook.html#custom-flows-via-yaml>

### 16.1.225 2.0.0-alpha30 (2016-12-12)

- Bug fixes submitted by @ccarter:
  - `uninstall_post` was failing to substitute namespaces
  - new util method `findRename` to rename files with a token in their name
- Bug fix with Unicode handling in `run_tests_debug`

### 16.1.226 2.0.0-alpha29 (2016-12-12)

- Require docutils to support rst2ansi

### 16.1.227 2.0.0-alpha28 (2016-12-12)

- Modified tasks and flows to properly re-raise exceptions

### 16.1.228 2.0.0-alpha27 (2016-12-12)

- `cci` should now throw the direct exception rather than making it look like the exception came through click
- `cci task doc` command outputs RST format documentation of all tasks
- New doc with info on all tasks: <http://cumulusci.readthedocs.io/en/latest/tasks.html>

### 16.1.229 2.0.0-alpha26 (2016-12-09)

- Bug fix, missing import of `re` in `core/config.py`



### 16.1.230 2.0.0-alpha25 (2016-12-09)

- Fixed `run_tests` and `run_tests_debug` tasks to fail throwing an exception on test failure
- `run_tests_debug` now stores debug logs in a tempdir
- Have the CLI handle `ApexTestException` events with a nicer error rather than a full traceback which isn't helpful to determining the apex failure
- `BaseMetadataApi` will now throw `MetadataApiError` after a Failed status is set
- `BaseFlow` now throws the original exception rather than a more generic one that obscures the actual failure

### 16.1.231 2.0.0-alpha24 (2016-12-09)

- Bug fix release, `flow_run` in the CLI should accept debug argument and was throwing an error

### 16.1.232 2.0.0-alpha23 (2016-12-09)

- `cci org browser` now saves the org back to the keychain. This fixes an issue with scratch orgs where a call to org browser on a scratch org that hasn't been created yet gets created but doesn't persist after the command
- `task run` and `flow run` now support the `-debug` flag which will drop you into the Python interactive debugger (pdb) at the point of the exception.
- Added Cookbook to the docs: <http://cumulusci.readthedocs.io/en/latest/cookbook.html>
- `flow run` with the `-delete-org` option flag and scratch orgs no longer fails the flow if the delete org call fails.
- Fixed the `deploy_post` task which has having errors with namespaced file names
- Fixed `update_admin_profile` to properly update the profile. This involved fixing the utils `findReplace` and `findReplaceRegex`.
- Reworked exceptions structure and ensure that tasks throw an exception where appropriate.

### 16.1.233 2.0.0-alpha22 (2016-12-02)

- Fix for bug in `deploy_post` when using the filename token to merge namespace into a filename

### 16.1.234 2.0.0-alpha21 (2016-12-01)

- Added support for global and project specific orgs, services, and connected app. The global credentials will be used by default if they exist and individual projects can override them.
  - Orgs still default to creating in the project level but the `-global` flag can be used in the CLI to create an org
  - `config_connected_app` command now sets the connected app as global by default. Use the `-project` flag to set as a project override
  - `connect_github`, `connect_mrbelvedere`, and `connect_apextestsdb` commands now set the service as global by default. Use the `-project` flag to set as a project override

### 16.1.235 2.0.0-alpha20 (2016-11-29)

- Remove `pdb` from `BaseFlow.__call__` (oops)

### 16.1.236 2.0.0-alpha19 (2016-11-29)

- Fix `IOError` issue with `update_admin_profile` when using the egg version
- Changed `cci task_run` and `flow_run` commands to no longer swallow unknown exceptions so a useful error message with traceback is shown
- Centralized loggers for `BaseConfig`, `BaseTask`, and `BaseFlow` under `cumulusci.core.logger` and changed logs to always write to a temp file available as `self.log_file` on any config, task, or flow subclass.

### 16.1.237 2.0.0-alpha18 (2016-11-17)

- New task `apextestsdbs_upload` uploads json test data to an instance of `ApexTestsDB`
- Fixed bug in CLI when running tasks that don't require an org
- Include mappings for Community Template metadata types in `package.xml` generator

### 16.1.238 2.0.0-alpha17 (2016-11-15)

- Community contributions by @cdcarter
  - `query` task using the Bulk Data API
  - `-login-url` option on `cci org connect`
- Salesforce DX wrapper
  - NOTE: Requires developer preview access to Salesforce DX
  - `cci org scratch <config_name> <org_name>` creates a wrapper for a scratch org in your keychain
  - Tasks and Flows run against a scratch org will create the scratch org if needed
  - `cci org scratch_delete <org_name>` deletes a scratch org that was created by running a task or flow
  - `cci flow run` now supports the `-delete-org` option to delete a scratch org at the end of the flow
  - `BaseSalesforceDXTask` wraps the heroku `force:*` commands. The `dx_push` task is provided as an example.
    - \* NOTE: Currently the command output is buffered and only outputs when the command completes.
- Integration with mrbelvedere
  - `mrbelvedere_publish` task publishes a beta or release tag to an existing package on mrbelvedere
- Flow changes
  - `ci_feature` now runs tests as part of the flow
  - New flow task configuration `ignore_failure` can be used to ignore a failure from a particular task in the flow
- `CUMULUSCI_KEY` is no longer required if using a keychain class with the `encrypted` attribute set to `False` such as the `EnvironmentProjectKeychain`
- Refactored OAuth token refresh to be more centralized and raise a proper exception if there is an issue
- The org keychain now correctly uses the instance url when appropriate

- Calls to `runTestsAsynchronous` in the Tooling API are now done via POST instead of GET

### 16.1.239 2.0.0-alpha16 (2016-11-3)

- Fix bug in SOAP calls to MDAPI with newer versions of the requests library
- This version was used to record the demo screencast: <https://asciinema.org/a/91555>

### 16.1.240 2.0.0-alpha15 (2016-11-3)

- Fix CLI bug in new exception handling logic

### 16.1.241 2.0.0-alpha14 (2016-11-3)

- Fix version number
- Fix bug in `BaseSalesforceBulkApiTask` (thanks @cdcarter)

### 16.1.242 2.0.0-alpha13 (2016-11-3)

- Nicer log output from tasks and flows using *coloredlogs*
- Added handling for packed git references in the file `.git/packed-refs`
- Docs now available at <http://cumulusci.readthedocs.io>
- Tasks and Flows run through the CLI now show a more simple message if an exception is thrown

### 16.1.243 2.0.0-alpha12 (2016-11-2)

- Automatic detection of latest production and beta release via Github Releases
  - `project_config.get_latest_release()` added to query Github Releases to find the latest production or beta release version
  - `InstallPackage` now accepts the virtual versions ‘latest’ and ‘latest\_beta’ as well as specific versions for the version option
- New flows:
  - `ci_feature`: Runs a full deployment of the unmanaged code for testing in a feature org
  - `ci_master`: Runs a full deployment of the managed version of the code into the packaging org
  - `ci_beta`: Installs the latest beta and runs all tests
  - `ci_release`: Installs the latest release and runs all tests
  - `release_beta`: Uploads a beta release of the metadata in the packaging org, creates a Github Release, and generates release notes
- Removed the hard coded slots in the keychain for github, mrbelvedere, and apextestsdb and replaced with a more generic concept of named keychain services. `keychain.get_service('name')` retrieves a named service. The CLI commands for setting github, mrbelvedere, and apextestsdb were modified to write the service configs to the new structure.

- Flow tasks can now access previous tasks' attributes in their options definitions. The syntax is `^^task_name.attr1.attr2`
- Flow output is now nicer showing the flow configuration and the active configuration for each task before execution
- New tasks
  - `update_package_xml_managed`: Create a new `package.xml` from the metadata in `src/` with attributes only available when deploying to packaging org
  - `run_tests`: Runs matching apex tests in parallel and generate a JUnit report
  - `run_tests_debug`: Runs matching apex tests in parallel, generates JUnit report, captures debug logs, and parses debug logs for limits usage outputting results to `test_results.json`
  - `run_tests_managed`: Runs matching apex tests in parallel from the package's namespace and generate a JUnit report

### 16.1.244 2.0.0-alpha11 (2016-10-31)

- `project_config.repo_root` is now added to the python syspath, thanks @cdcarter for the contribution
- Tasks for the new Package Upload API
  - `upload_beta`: Uploads a beta release of the metadata currently in the packaging org
  - `upload_production`: Uploads a production release of the metadata currently in the packaging org
- Dependency management for managed packages:
  - `update_dependencies`: Task that ensures the target org has all dependencies installed at the correct version
  - Dependencies are configured using the `dependencies` heading in `cumulusci.yml` under the `project` section
- Integrated salesforce-bulk and created `BaseSalesforceBulkApiTask` for building bulk data tasks
- Added `cci version` command to print out current package version, thanks @cdcarter for the contribution

### 16.1.245 2.0.0-alpha10 (2016-10-28)

- More pure Python tasks to replace ant targets:
  - `create_ee_src`
  - `retrieve_packaged`
  - `retrieve_src`
  - `revert_ee_src`
  - `uninstall_packaged_incremental`
  - `update_admin_profile`
- New flow:
  - `unmanaged_ee`: Deploys unmanaged code to an EE org
- New `cumulusci.utils`
  - `CUMULUSCI_PATH`: The absolute path to the root of CumulusCI
  - `findReplaceRegex`: Recursive regex based search/replace for files

- zip\_subfolder: Accepts a zipfile and path, returns a zipfile with path as root
- Fix bug where repo\_name was not being properly handled if it origin ended in .git

### 16.1.246 2.0.0-alpha9 (2016-10-27)

- Switch to using *plaintable* for printing text tables in the following CLI commands:
  - cci org list
  - cci task list
  - cci task info
  - cci flow list
- Easier project set up: *cci project init* now prompts for all project values using the global default values
- More pure Python Metadata API tasks:
  - create\_package
  - install\_package
  - uninstall\_managed
  - uninstall\_packaged
  - uninstall\_pre
  - uninstall\_post
  - uninstall\_post\_managed
- New tasks to interact with the new PackageUploadRequest object in the Tooling API
  - upload\_beta
  - upload\_production
- Python task to replace deployUnpackagedPost ant target with support for replacing namespace prefix in filenames and file contents
  - deploy\_post
  - deploy\_post\_managed
- Python tasks to replace createManagedSrc and revertManagedSrc ant targets
  - create\_managed\_src
  - revert\_managed\_src

### 16.1.247 2.0.0-alpha8 (2016-10-26)

- New tasks for push upgrading packages
  - push\_all: Pushes a package version to all available subscriber orgs
    - \* ex: cci task run –org packaging -o version 1.1 push\_all
  - push\_qa: Pushes a package version to all org ids in the file push/orgs\_qa.txt in the repo
    - \* ex: cci task run –org packaging -o version 1.1 push\_qa
  - push\_sandbox: Pushes a package version to all available sandbox subscriber orgs

- \* ex: `cci task run -org packaging -o version 1.1 push_sandbox`
- `push_trial`: Pushes a package version to all org ids in the file `push/orgs_trial.txt` in the repo
  - \* ex: `cci task run -org packaging -o version 1.1 push_trial`
- Configurable push tasks in `cumulusci.tasks.push.tasks`:
  - \* `SchedulePushOrgList`: uses a file with one OrgID per line as the target list
  - \* `SchedulePushOrgQuery`: queries `PackageSubscribers` to select orgs for the target list
- Additional push tasks can be built by subclassing `cumulusci.tasks.push.tasks.BaseSalesforcePushTask`

### 16.1.248 2.0.0-alpha7 (2016-10-25)

- New commands for connecting to other services
  - `cci project connect_apextestsdb`: Stores `ApexTestDB` auth configuration in the keychain for use by tasks that require `ApexTestsDB` access
  - `cci project connect_github`: Stores Github auth configuration in the keychain for use by tasks that require Github access
  - `cci project connect_mrbelvedere`: Stores `mrbelvedere` auth configuration in the keychain for use by tasks that require access to `mrbelvedere`
  - `cci project show_apextestsdb`: Shows the configured `ApexTestsDB` auth info
  - `cci project show_github`: Shows the configured Github auth info
  - `cci project show_mrbelvedere`: Shows the configured `mrbelvedere` auth info
- Github Tasks
  - The new `BaseGithubTask` wraps the `github3.py` API library to allow writing tasks targetting Github
  - The following new Github tasks are implemented on top of `BaseGithubTask`:
    - \* `github_clone_tag`: Clones one git tag to another via the Github API
    - \* `github_master_to_feature`: Merges the HEAD commit on master to all open feature branches via the Github API
    - \* `github_release`: Creates a Release via the Github API
    - \* `github_release_notes`: Generates release notes by parsing merged Github pull request bodies between two tags
- `BaseTask` now enforces required `task_options` raising `TaskOptionError` if required options are missing
- Restructured the project: heading in `cumulusci.yml`

### 16.1.249 2.0.0-alpha6 (2016-10-24)

- Moved the build and ci directories back to the root so 2.0 is backwards compatible with 1.0
- Allow override of keychain class via CUMULUSCI\_KEYCHAIN\_CLASS env var
- New keychain class cumulusci.core.keychain.EnvironmentProjectKeychain for storing org credentials as json in environment variables
- Tasks now support the salesforce\_task option for requiring a Salesforce org
- The new BaseSalesforceToolingApi task wraps simple-salesforce for building tasks that interact with the Tooling API
- cumulusci org default <name>
  - Set a default org for tasks and flows
  - No longer require passing org name in task run and flow run
  - --unset option flag unsets current default
  - cumulusci org list shows a \* next to the default org
- BaseAntTask split out into AntTask and SalesforceAntTask
- cumulusci.tasks.metadata.package.UpdatePackageXml:
  - Pure python based package.xml generation controlled by metadata\_map.yml for mapping in new types
  - Wired into the update\_package\_xml task instead of the old ant target
- 130 unit tests and counting, and our test suite now exceeds 1 second!

### 16.1.250 2.0.0-alpha5 (2016-10-21)

- Update README

### 16.1.251 2.0.0-alpha4 (2016-10-21)

- Fix imports in tasks/ant.py

### 16.1.252 2.0.0-alpha3 (2016-10-21)

- Added yaml files to the MANIFEST.in for inclusion in the egg
- Fixed keychain import in cumulusci.yml

### 16.1.253 2.0.0-alpha2 (2016-10-21)

- Added additional python package requirements to setup.py for automatic installation of dependencies

## 16.1.254 2.0.0-alpha1 (2016-10-21)

- First release on PyPI.

## 16.2 Contribute to CumulusCI

Contributions are welcome, and they are greatly appreciated!

### 16.2.1 Types of Contributions

You can contribute in many ways:

#### Report Bugs

Report bugs at <https://github.com/SFDO-Tooling/CumulusCI/issues>.

When reporting a bug, please include:

- Your operating system name and version.
- Any details about your local setup that might be helpful in troubleshooting.
- Detailed steps to reproduce the bug.

#### Fix Bugs

Look through the GitHub issues for bugs. Anything tagged with “bug” and “help wanted” is open to whomever wants to implement it.

#### Implement Features

Look through the GitHub issues for features. Anything tagged with “enhancement” and “help wanted” is open to whomever wants to implement it.

#### Write Documentation

CumulusCI could always use more documentation, whether as part of the official CumulusCI docs, in docstrings, or even on the web in blog posts, articles, and such.

#### Submit Feedback

The best way to send feedback is to file an [issue](#).

If you are proposing a feature:

- Explain in detail how it would work.
- Keep the scope as narrow as possible, to make it easier to implement.
- Remember that this is a volunteer-driven project, and that contributions are welcome :)



## 16.2.2 Install for Development

Ready to contribute? Here's how to set up CumulusCI for local development.

1. Fork the CumulusCI repo on GitHub.
2. Clone your fork to your local workspace.
3. Create a fresh Python 3 virtual environment and activate it (to keep this isolated from other Python software on your machine). Here is one way:

```
$ python3 -m venv cci_venv
$ source cci_venv/bin/activate
```

4. Install the development requirements:

```
$ make dev-install
```

5. Install pre-commit hooks for black and flake8:

```
$ pre-commit install --install-hooks
```

6. After making changes, run the tests and make sure they all pass:

```
$ pytest
```

7. Your new code should also have meaningful tests. One way to double check that your tests cover everything is to ensure that your new code has test code coverage:

```
$ make coverage
```

8. Push your changes to GitHub and submit a Pull Request. The base branch should be a new feature branch that we create to receive the changes (contact us to create the branch). This allows us to test the changes using our build system before merging to main.

---

**Note:** We enable typeguard with pytest so if you add type declarations to your code, those declarations will be treated as runtime assertions in your Python tests.

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## 16.2.3 Pull Request Guidelines

Before you submit a pull request, check that it meets these guidelines:

- Documentation is updated to reflect all changes.
- New classes, functions, etc have docstrings.
- New code has comments.
- Code style and file structure is similar to the rest of the project.
- You have run the black code formatter.
- If you are a new contributor, don't forget to add yourself to the `AUTHORS.rst` file in your pull request (either GitHub username, or first/last name).

## 16.2.4 Testing CumulusCI

### Org-reliant Automated Tests

Some tests are marked `@pytest.mark.vcr()` which means that they can either call into a real (configured) Salesforce org or use a cached YAML file of the request/response.

By default using pytest will use the cached YAML. If you want to work against a real scratch org, you do so like this:

```
$ pytest --org qa <other arguments and options, such as filename or -k testname>
```

Where “orgname” is a configured org name like “qa”, “dev”, etc.

To regenerate the VCR file, you can run this command:

```
$ pytest --replace-vcrs --org qa
```

This will configure an org named “qa” and regenerate them.

That will run all VCR-backed tests against the org, including all of the slow integration tests.

### Running Integration Tests

Some tests generate so much data that we do not want to store the VCR cassettes in our repo. You can mark tests like that with `@pytest.mark.large_vcr()`. When they are executed, their cassettes will go in a .gitignore’d folder called `large_cassettes`.

Do not commit the files (`large_cassettes/\*.yaml`) to the repository.

Some tests generate even more network traffic data and it isn’t practical to use VCR at all. Still, we’d like to run them when we run all of the other org-reliant tests with `--org`. Mark them with `@pytest.mark.needs_org()` and they will run with the VCR tests.

Some tests are so slow that you only want to run them on an opt-in basis. Mark these tests with `@pytest.mark.slow()` and run them with `pytest --run-slow-tests` or `pytest --run-slow-tests --orgname <orgname>`.

### Writing Integration Tests

All features should have integration tests which work against real orgs or APIs.

Our test suite makes extensive use of pytest fixtures; the ones below should be used in your tests where appropriate. Search the repo to see examples where they are used in context, or to see their definitions:

- `gh_api` - get a fake github API
- `with temp_db():...` - create a temporary SQLite Database
- `delete_data_from_org(“Account,Contacts”)` - delete named subjects from an org
- `run_code_without_recording(func)` - run a function ONLY when the integration tests are being used against real orgs and DO NOT record the network traffic in a VCR cassette
- `sf` - a handle to a simple-salesforce client tied to the current org
- `mock_http_response(status)` - make a mock HTTP Response with a particular status
- `runtime` - Get the CumulusCI runtime for the current working directory
- `project_config` - Get the project config for the current working directory
- `org_config` - Get the project config for the current working directory

- `create_task` - Get a `task_factory` which can be used to construct task instances.
- `global_describe` - Get a function that will generate the JSON that Salesforce would generate if you do a GET on the `/subjects` endpoint

Decorators for tests:

- `pytest.mark.slow()`: a slow test that should only be executed when requested with `--run-slow-tests`
- `pytest.mark.large_vcr()`: a network-based test that generates VCR cassettes too large for version control. Use `--org` to generate them locally.
- `pytest.mark.needs_org()`: a test that needs an org (or at least access to the network) but should not attempt to store VCR cassettes. Most tests that need network access do so because they need to talk to an org, but you can also use this decorator to give access to the network to talk to github or any other API.
- `org_shape('qa', 'qa_org')`: - switch the current org to an org created with org template “qa” after running flow “qa\_org”. As with all tests, clean up any changes you make, because this org may be reused by other tests.

## Randomized tests

Tests should be executable in any order. You can run this command a few times to verify if they are:

```
pytest --random-order
```

It will output something like this:

```
Using --random-order-bucket=module Using --random-order-seed=986925
```

Using those two parameters on the command line, you can replicate a particular run later.

In extremely rare cases where it's not possible to make tests independent, you can [enforce an order](#)